

A LASSIE

LEGACY

ESTATE PLANNING WORKSHEET FOR PETS

It's difficult to think about our pets going on without us, but it shouldn't go ignored. Here's how to keep tails wagging, cats purring, and all other animals looked after if something happens to you.

REMEMBER

Consider storing this information in a secure location that allows you to update and share these details with the people you love and trust.

YOUR PET

- Pet's name:
- Type of pet:
- Birthday:
- Adoption record location:
- Pet license (state/location):
- Microchip info:

VETERINARIAN & MEDICINE

- Vet's name/Practice:
- Contact info:
- Medicine/Medical treatment required (example: heartworm meds, flea/tick prevention):

MEDICAL & VACCINATION RECORDS

- Medical/Vaccination records location:
- Vaccinations (include: the date in the "administered/due;" example: June 2015/December 2019):

TYPE:	ADMINISTERED/DUE:



HEALTH & DIET NEEDS

- Standard food (brand/preparation/portion):
- Favorite food:
- Food allergies:
- Favorite treats:

PET INSURANCE

- Insurance provider:
- Account number:
- Website/Login info:
- Additional info (examples: how you pay the premiums each month; how claims are submitted):

PET GUARDIAN

Who would take care of your pets if you couldn't?

- Pet guardian:
- Guardian's contact information:
- Special instructions (include: any specific directions the guardian should follow; if no official guardian has been named, you should include other relevant instructions in this area):

FINANCIAL/LEGAL ARRANGEMENTS:

If you've made any financial or legal arrangements to provide care for your pet, include that information here.

- Pet trust** (include: the name of trust, bank location, trustees, specific stipulations, etc.):
- Power of attorney** (If you've created a POA for your pet guardian, include the type of POA as well as where you keep the official signed and notarized document.):
- Will** (Have you made provisions in your will for your pet? If so, where do you keep the official signed and notarized document? If not, use the space below to write out provisions you should add to your will.):

TOYS, ACTIVITIES, QUIRKS, CUDDLES

With the official business out of the way, let's get down to the serious stuff. Namely: **LOVE!**

- Favorite toys** (include brands and if there are special things you do to assist playtime):
- Favorite activities** (swimming, hiking, sitting in front window and spying on the neighbors):
- Special quirks** (scared of thunder, loves country music, won't use litter box if being watched):
- Affection and praise** (belly rubs, cuddling under blankets, back scratches, cradle like a baby):
- Photos/Social media** (Instagram/Facebook page account info; cloud where you keep photos and videos):

NOTES & PERSONAL THOUGHTS

Use this section for additional information (example: sleeping preferences, best friends), personal thoughts, some of the pet's history, or anything we may have missed.

Your employer has selected Transamerica Retirement Solutions as your retirement plan provider, but there are no other affiliations between the two organizations.