

## What do 300 Cockatiels, 4 Cats, and 2 Dogs have in Common?

Article written by Bennie A. Wall, Esq.

Their owners made a big mess when they died without a plan for them or their care.

Don't let your clients be a punchline and miss out on a crucial planning opportunity. With pets being among the dearest members of the family, you can build great rapport with your clients and their families by helping them protect these vulnerable family members.

It is estimated that nearly 68% of U.S. households own a pet. That's just under 85 million families across the U.S. With different animals come different life expectancies and expenses. Therefore, planning for these furry family members should be a key priority for many families.

I've worked with many clients who are interested in making sure their beloved pets are well cared for when they no longer can provide care. We have used tools such as outright gifting, charitable foundations, and even Pet Trusts to help clients ensure that their beloved pet is well cared for when the time comes.

Working through Legacy Fiduciary Services, PLC ("Legacy"), I've seen two instances in the last year where an animal lover left behind pets with no plans for their continued care. One of the first estates I managed involved a single lady who never had children, other than her two pups, and never married. She was a devout Christian who lived in her childhood home, which was now in the middle of one of Richmond's less-than-favorable neighborhoods. She was a great steward of her wealth, and her financial advisor had done very well for her. She passed away at 87 with a few million dollars in her estate. She left her entire estate to her church and named Legacy as her Executor. What she did not do, however, was make a plan for her two beloved rescued dogs.

Since there was no plan in place, Legacy was left with the task of caring for the animals while trying to find a suitable home. We found no volunteers to take in the two labs and found that all of the shelters in the area were at full capacity. For three months, I personally went to care for the dogs twice a day until we were finally able to place them with the Richmond SPCA.

The second case involved four cats whose owner passed unexpectedly. The cats had very special dietary needs, and one of the older cats needed insulin shots. We were able to find placement for the

cats with a local vet who could meet their unique needs, but it took a few months to find suitable homes for these high-maintenance kitties and left the estate with a large vet and boarding bill to pay.

This phenomenon is not local to the area by any means. A recent story out of Alaska takes this hassle to a whole other extreme where an Anchorage local passed away leaving behind **300 COCKATIELS!** After hearing this story, caring for two dogs for three months sounded like a walk in the park.

The Anchorage “Birdman” took a lot of pride in his birds and even constructed an aviary room in his house for his feathered friends. Despite all the measures he took to care for the birds during his lifetime, he made no provision for his 300 birds in his estate plan, and it fell to local volunteers to step in and care for his flock. With daily feeding, cleaning, and caregiving, this venture is getting more expensive by the day as the local volunteer group is looking to find homes for this very popular species of bird. If you are an empty nester looking to adopt one of these famed birds, you can reach out to the Alaska Bird Club’s Facebook page to find opportunities.

While this example is extreme, there is no shortage of pet owners who want to plan for their pets, and there are many ways your clients can make plans for their beloved animals. The key is to get the conversation started and talk through the possibilities with your clients. You may find they, have yet to think far ahead and will appreciate you saving the day. In some cases, with animals whose care costs significantly more than usual end with a long life expectancy, you may find your clients wanting your assistance setting up a way to fund an investment to last for the animal(s)’ lifetime(s).

In any event, at the very least, a basic plan should be in place for any pet owner. A well drafted Power of Attorney can make sure animals are cared for if the owner becomes incapacitated. Provisions in a Will or a Revocable Living Trust can also be instrumental in making sure pets are passed on to a trusted caregiver when an owner passes away.

For some guidance on how to talk to your clients about their pet planning and their various options for providing for a pet’s care, check out our latest blog posts: [Considerations When Choosing a Pet’s Caregiver](#) and [Estate Planning Options for Pet Owners: Planning for a Crisis and after Death](#).