

# Pet Planning Worksheet

*A planning worksheet to ensure your animals are cared for according to your wishes*



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# Introduction



Alex Kincaid is an Idaho attorney, rancher, and lifelong animal advocate who has dedicated much of her practice to helping families protect not only their loved ones, but also the animals that are part of their lives and legacies. Raised with a deep respect for animals, land stewardship, and the bond between humans and the creatures entrusted to their care, Alex approaches estate planning with the belief that animals deserve thoughtful preparation and protection should the unexpected occur. Through the development of the “Pet Planner” and “Ranch Planner,” Alex hopes to encourage families to view themselves not simply as owners, but as Kahus—guardians and stewards entrusted with the care, guidance, and future well-being of the animals who share their journey.

## The Meaning of Kahu

Kahu is a Hawaiian word meaning guardian, keeper, or steward, representing a deep, nurturing responsibility for someone or something precious. Rather than ownership, it signifies a spiritual connection and trust. Common usage includes being a Kahu to a pet, a steward of the land, or a pastor of a church.

The word is commonly associated with:

- Guardian or Protector: A person who ensures the safety of something cherished.
- Caretaker or Steward: One who looks after and nurtures, particularly pets, land, or spiritual items.

The term is often used in several contexts, including:

- Pets: Instead of “owner,” a person is the Kahu of their dog, cat, or animal.
- Spirituality: Kahu are traditionally trusted with sacred objects, sites, or spiritual ceremonies.
- Community: Teachers or mentors nurturing growth may also be referred to as Kahu.



## Our Philosophy

At Alex Kincaid Law, we believe that animals are sentient beings, spirit guides placed on this earth to help us on our journey. Each animal that comes into your life is a blessing, a gift from the universe. They are here to teach us and guide us at least as much as we are here to help and guide them. Part of the caretaking we can provide is to ensure that the animal continues to be with you, if possible, during your incapacity, and to have the best possibilities for a continued journey should you leave earth before the animal. We have developed our “pet planner” and “ranch planner” with this mindset, and we hope you enjoy taking these steps for the animals for whom you serve as Kahu.



# Pet Overview

## A general Overview of Your Family

Your pets are family, and just like every other member of your family, they deserve a plan that protects them if something happens to you. Too often, beloved pets are left without clear instructions for their care, creating unnecessary stress and uncertainty during an already difficult time.

This planner is designed to help ensure your pets continue to receive the love, care, and attention they are accustomed to while also supporting your overall estate planning goals. Within this planner, you will find an individualized profile section for each of your pets where you may record important information such as medical history, medications, dietary needs, routines, veterinarian information, favorite comforts, behavioral traits, and any other special care instructions.

Please complete one profile for each pet so your loved ones have the guidance they need to properly care for them in your absence.



**PET NAME**

**SPECIES**

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# INDIVIDUAL PET PROFILE

Pet Name

Species/Breed

Color/Markings

Age/DOB

Microchip #

Tag/Collar Info

Preferred Gaurdian



**Pet Photo**

## Temperament

- Calm    Friendly    Anxious
- Aggressive    Working Animal
- Protective    Good with kids
- Good with livestock
- Other: \_\_\_\_\_

## Food & Feeding

**Diet Type: Dry / Wet / Raw / Mixed**

Food Given Time:

Supplements Time:

Medication Time:

**Notes:**

# INDIVIDUAL PET PROFILE:

## Medical Information

### Veterinary Information

Veterinarian Name:

Clinic Name

Phone Number:

Address:

Emergency Vet:

Records Location:

### ○○○ Vaccinations:

Distemper/Parvo

Date:

Rabies

Date:

Bordetella

Date:

Other:

Date:



## Behavioral Concerns

Biting  Herding  Anxiety  Aggression  Other:

**Notes:**

## Pet Insurance

Company Name:

Policy Number

Phone Number:

Address:



# INDIVIDUAL PET PROFILE:

## Grooming & Care

### Groomer Information

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_



## Grooming Schedule

<u>Task</u>	Pet Name	Frequency	Last Done	Next Due
Brushing				
Bathing				
Nail Trim				
Ear Cleaning				
Teeth Cleaning				



### Boarding Facility/Pet Sitter

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_



# COST AND EXPENSES



	Monthly	Annually
<b>Food</b>		
<b>Medication</b>		
<b>Grooming</b>		
<b>Veterinary Care</b>		
<b>Pet Health Insurance</b>		
<b>Boarding/ Pet Sitting</b>		
<b>Toys &amp; Treats</b>		
<b>Compensation to Caretaker</b>		
<b>Other</b>		
<b>Total</b>		



## HOW DO YOU WANT TO LEAVE MONEY FOR YOUR PET?

**No money, only custody of the pet(s)**

Notes: \_\_\_\_\_

\_\_\_\_\_

**A lump sum with custody of the pet(s)**

Notes: \_\_\_\_\_

\_\_\_\_\_

Amount: \_\_\_\_\_

**In a trust to be managed by a third party**

Notes: \_\_\_\_\_

\_\_\_\_\_

Amount: \_\_\_\_\_

# CARETAKERS

Choosing a caretaker for your pets in your estate plan ensures they will be properly cared for if something happens to you. By naming a trusted person in advance, you help prevent uncertainty and make sure your pets are placed with someone who understands and is willing to meet their needs

**Use this page if you would like to name one primary caretaker for all of your pets.**



## **First Choice Caretaker**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

## **Second Choice Caretaker**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

## **Third Choice Caretaker**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Relationship: \_\_\_\_\_

Notes:



# Special Notes/Instructions

## Routine Care



## Medical Treatment



## End-Of-Life Care

