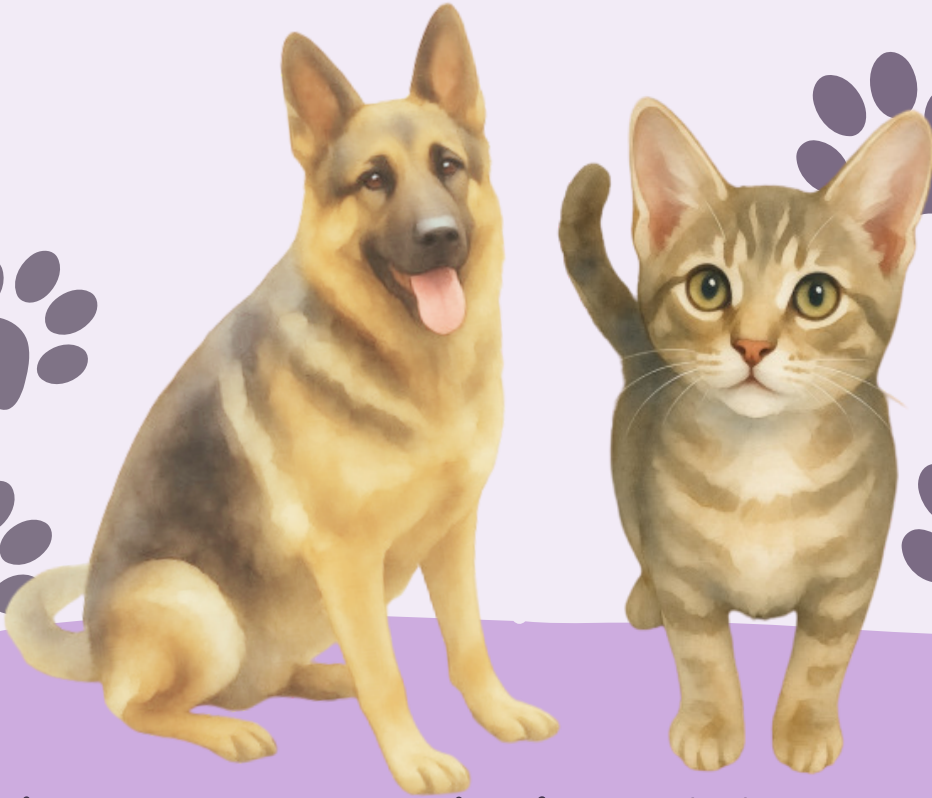


pet planning worksheet



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 and lifelong animal advocate whose practice helps families protect their loved ones, their animals, and their legacies. With a deep respect for animals and the human-animal bond, Alex believes thoughtful estate planning should provide for the animals entrusted to our care when the unexpected occurs. Through the “Pet Planner,” Alex encourages families to see themselves not simply as owners, but as Kahus—guardians and stewards responsible for the care, guidance, and future well-being of the animals who share their journey.



THE MEANING OF KAHU

Kahnu 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 animals are sentient beings and spirit guides, each a blessing placed in our lives to teach and guide us as much as we guide them. Part of serving as their Kahu is planning for their care if we are no longer able to be with them. We created our Pet Planner with this philosophy in mind—to help you protect the animals who share your journey and provide for theirs, even when your journey together comes to an end.

PET OVERVIEW

Our pets are family, and like every 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 Pet Planner is designed to help ensure your pets continue to receive the love, care, and attention they are accustomed to while supporting your overall estate planning goals. It includes an individualized profile for each pet where you can record important information, including medical history, medications, dietary needs, routines, veterinarian information, favorite comforts, behavioral traits, and special care instructions.

Please complete one profile for each pet so those entrusted with their care have the guidance they need to love and care for them in your absence.

NAME	SPECIES

INDIVIDUAL PET PROFILE

PHOTO

NAME

BREED

GENDER

AGE

MICROCHIP #

HOME
ADDRESS

FOOD

BREAKFAST

LUNCH

DINNER

WATER

TREATS

HUMAN FOOD

WALK / PLAY SCHEDULER

TIME

PLACE / ACTIVITY

MEDICINE & ALLERGIES

EMERGENCY CONTACTS

OWNER

VETERINARIAN

Medical Information

Pet Name:

Veterinary Information



Veterinarian Name:	
Clinic Name:	
Phone Number:	
Address:	
Emergency Vet:	
Records Location:	

Pet Insurance

Company Name:	
Policy Number:	
Phone Number:	
Address:	

Vaccination Records

Vaccine	Date
Distemper/Parvo	
Rabies	
Bordetella	
Other	



Grooming & Care

Pet Name:

Boarding Facility/Pet Sitter

Name:	
Address:	
Phone:	
Email Address:	

Groomer Information

Name:	
Address:	
Phone:	
Email Address:	

Grooming Schedule

Grooming Task	Frequency / Date
Bathing	
Brushing	
Nail Trimming	
Ear Cleaning	
Haircut/Trim	



Pet Expenses

Pet Name: _____



Pet Expenses

Expense Category	Amount
Food	
Medication	
Grooming	
Veterinary Care	
Pet Health Insurance	
Boarding/ Pet Sitting	
Toys & Treats	
Compensation to Caretaker	
Other	
Total	

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: _____



Caretaker Information

Pet Name:

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



Thank you for planning ahead!
Your thoughtful preparation helps
ensure your pets will always have
the love, care and protection they
deserve.