

Looking after your Pets in your Will: What are the options?

For many pet owners, their pets are not just animals they keep, but friends, companions, and members of the family. Even if you don't see your pets in the same way, you will still want to take care of them and keep them from harm in future. Considering what would happen to your pets if you died is all part of protecting their welfare. They can't do this for themselves, so it is up to you to do it for them!

This factsheet explores some of the ways you can take care of your pets through the terms of your Will.

Can I leave money to my pets?

The short answer to this is no.

You often hear stories of cats or dogs inheriting fortunes but, in England and Wales at least, it is impossible to leave money to your pet. Gifts of money or property in your Will must be to human individuals or legal individuals, such as companies or charities. As far as the law is concerned, your pet is an asset of your estate and so it cannot be a beneficiary.

If you put a clause in your Will leaving money or property to your pet, then this gift will fail, and the money or property will usually pass into the residue of your estate, to be distributed amongst your residuary beneficiaries.

Is there any alternative?

Instead of leaving money or property to your pet directly, you could put money into a Trust to be used for the care of your pet.

If you wish to do this, you will need to appoint a specific person (or more than one person) to look after the money in the Trust. These will be the Trustees of the Trust and will have powers to use the trust money, to care for your pet in any way they see fit.

If you would like to know more about Trusts, have a look at our <u>factsheet</u>, Trusts: A Detailed Guide'.

It can often help to leave your Trustees a Letter of Wishes with your Will, allowing them to understand your intentions for the care of your pet. The Letter will usually set out how you would like your pet to be taken care of and how the money should be spent for their benefit.

How much can I leave for my pets?



There is no fixed amount or limit to what you can put into a Trust. However, you must ensure that whatever amount you leave is 'appropriate'. For instance, it might not be appropriate to put £100,000 into a Trust for the benefit of an elderly cat, because this may be viewed as an unreasonably large amount when considering the cat's needs and life expectancy. On the other hand, the same amount to care for a young horse may be more reasonable.

It is possible that, where an inappropriate sum is left to the Trust, the entire gift could fail on those grounds. You can avoid such problems by adding a clause to your Will indicating where any left-over money should go if it is not all spent before your pet dies. You might decide that any left-over money should go to an individual, or individuals, or to an animal charity, which might be a fitting tribute.

Who will care for my pets?

It can give great peace of mind to know that someone will be able to take over care of your pets if anything should happen to you.

You could nominate someone to take on this role, if you wish, and provide that person with a gift of money for the care and maintenance of your pet. Often this will be a trusted friend or family member, who you know will love and care for your pet as you do.

Alternatively, you could request that your pet be given to a specific charity. If you have a West Highland Terrier, for example, you could nominate the Westie Rehoming charity to take and rehome your dog, so that they are cared for by a charity which has knowledge of the specific needs of the Westie breed.

There are also some more general animal charities, such as Dogs Trust or Cats Protection, who have schemes in place to care for your pet until they are rehomed. You may also wish to financially benefit any charity you nominate as a 'thank you' for rehoming your pet.

How Roche Legal can help

Dealing with legal issues can be confusing and stressful. We understand this, and we're always on hand to untangle jargon and offer support.

If you need advice on any of the issues raised in this factsheet, please don't hesitate to get in touch. Roche Legal is an award-winning legal practice, offering practical and caring advice.

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