

Client Conversation Cards

PawsinTrust™ Professional Partner Resource — For attorney and intake-team use

Use these prompt cards during client intake or an estate-planning review meeting to surface family animal continuity-of-care topics naturally. Each card contains a short opening prompt, supporting questions, and a suggested follow-up so intake staff can capture the information a drafting attorney will need later.

PawsinTrust™ is not a law firm and does not provide legal advice. This document is an educational planning resource and organizational framework intended to support conversations about continuity of care for family animals. Enforceability of any planning arrangement depends on the laws of the applicable jurisdiction. Clients should consult a qualified professional licensed in their jurisdiction.

How To Use These Cards

- Print single-sided and cut along the card borders, or keep the full sheet in the intake binder.
- Ask one card per topic — the goal is to open the conversation, not to complete a form.
- Record answers in the client file, or ask the client to complete the Family Animal Estate Planning Intake Worksheet at home.
- Keep language educational and organizational; avoid predicting legal outcomes.

Conversation Cards

CARD 1

Who is part of the family, including family animals?

- Do you share your home with any family animals?
- How many, and what are their names, species, ages, and approximate weights?
- Are any of them senior, or living with a chronic condition?

Follow-up: Capture each animal's name and species in the client file so later documents can name them individually.

CARD 2

If you were hospitalized tomorrow, who would care for them tonight?

- Who has a key or code to your home?
- Does that person already know your animals?
- Has anyone agreed to this in advance, or is it an assumption?

Follow-up: Note the short-term emergency caregiver, and whether they have actually been asked.

CARD 3**Who would provide permanent care if you could no longer?**

- Have you identified a long-term caregiver or guardian?
- Is there a second choice if the first is unable or unwilling?
- Should any specific person be excluded from consideration?

Follow-up: Record primary and alternate caregivers, plus any exclusions the client requests.

CARD 4**What would care cost, and how should it be funded?**

- Roughly what do you spend monthly on food, routine care, and medications?
- Are there recurring specialist or grooming costs?
- Do you want funds set aside, and if so, held how?

Follow-up: Note estimated annual cost and the client's funding preference for later discussion.

CARD 5**What does daily care actually look like?**

- Feeding routine, portions, and any dietary restrictions?
- Medications, dosages, and administration notes?
- Behavioral needs, fears, or handling instructions a new caregiver must know?

Follow-up: Direct the client to the Family Animal Care Instructions Worksheet to capture details.

CARD 6**Who are the professionals already involved in their care?**

- Primary veterinarian and clinic, and any specialists?
- Preferred emergency hospital?
- Groomer, trainer, walker, sitter, or boarding facility?

Follow-up: Collect clinic names and phone numbers for the client's care record.

CARD 7**Have you documented your wishes for end-of-life care?**

- Do you have preferences regarding quality-of-life decisions?
- Who should be authorized to make those decisions with the veterinarian?
- Are there aftercare wishes you would want honored?

Follow-up: Handle gently; offer the Compassionate End-of-Life and Incapacity Planning Worksheet.

CARD 8**Should your existing documents mention your family animals?**

- Does your current plan address animals at all?
- Would you like animal provisions coordinated with your Will, Trust, or incapacity documents?
- Who should hold copies of the care instructions?

Follow-up: Flag the file for review of animal provisions at the next drafting stage.

Intake Notes

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