

Planning Ahead

A Gift Only You Can Give

A practical guide for the animals you love

Tomten Farm and Sanctuary
tomtenfarmandsanctuary.org

Planning ahead is not about giving up -- it is about giving more to the animals you love and the future they deserve.

Life is unpredictable. The following is a collection of things to do and information to gather now, while you have the time and clarity, so that if the unexpected ever arrives, the people stepping in to care for your animals can do so quickly, confidently, and well, helping ensure your beloved animal friends remain safe and well cared for for the rest of their lives.

Trust us, it matters. There are more animals in need than there are homes and sanctuaries able to help them, and the efforts you make now can make all the difference for them later.

This does not have to happen all at once, and it does not have to be perfect. Set aside an hour, start with the section that feels most manageable, and build from there. Think of it as a gift you are giving your animals, and yourself, one step at a time. Even completing a portion of this is a meaningful and loving act, and every section you finish brings you closer to the peace of mind that comes from knowing your animals are protected.

WHAT TO GATHER AND PUT IN PLACE

People and organizations need to know exactly who needs help. The more clearly you can tell that story, the better protected your animals will be.

1. Basic Information

This is your starting point, and it is simpler than it sounds. Gather clear, recent photos of each animal labeled with their name, along with their name, age, breed, and gender, and any microchip or other identification information. If you have never done anything else on this list, start here today. It takes less than an hour and it matters more than you might think. When someone is trying to help your animals in a hurry, knowing exactly who they are dealing with makes all the difference.

2. Medical Records

Collect your veterinary history, including vaccinations, dental and hoof care history, current medications and dosages, known conditions, supplements or special dietary needs, and contact information for your veterinarian, farrier, dentist, and any other important care providers. You do not want your animals to miss medications or care because no one knew they were needed. If your records are scattered or incomplete, your veterinarian's office can often help you pull together a summary. Do not hesitate to ask.

3. Daily Care Details

Write down your feeding schedule, including the type and quantity of hay, grain, and supplements, turnout and pasture arrangements, housing preferences, seasonal care needs such as blanketing or fly protection, and any behavioral notes related to daily handling. Do not assume anyone else knows your routine. Write it as if explaining it to someone who has never met your animals. Every detail you include is another layer of protection for the animals you love.

4. Temperament, Training, and Skills

Note whether each animal leads and halts well, their comfort level with grooming and veterinary care, herd dynamics and bonded companions, any fears or sensitivities, and any special handling notes. If applicable, include whether they are trained to ride, drive, pack, or perform other work, and at what level. This section will look different for every guardian depending on species and how your animals are used, and that is exactly as it should be. A horse person and a goat person will fill this out very differently. What matters is that whoever steps in has a clear and honest picture of who your animals are and what they know.

5. History

Note how long each animal has been in your care, where they came from, and any significant life events such as illness, injury, or major transitions. Include any bonded companions they should remain with if at all possible. This section is especially important if you have multiple animals and no single person would be able to take them all. A thorough history can ensure that bonded pairs and trios are not split up, and it can also keep everyone safe. If you know an animal cannot be ridden, does not trailer well, or runs through fences when left alone, saying so here protects both your animals and the people trying to help them. An animal's history is part of who they are, and even a few sentences per animal can be an extraordinary gift to the person stepping in to care for them.

You are halfway there. Every section you complete is an act of love and protection for the animals who depend on you. Keep going.

6. Legal and Ownership Documentation

Gather registration papers, proof of ownership, and any transfer or surrender paperwork that can be prepared in advance. Having a written authorization in place that allows a trusted person to make decisions about your animals in an emergency is equally important and often overlooked. Keep all of these documents somewhere accessible, make sure at least one trusted person knows exactly where they are stored, and consider giving a copy to any organizations or individuals who may one day be involved in your animals' care.

7. Sanctuary and Rehoming Planning

Do not just make a list and put it in a folder. Take the time now to actually contact the organizations and individuals you are considering, introduce yourself and your animals, and ask honest questions about their capacity and intake process. Understand who you are reaching out to. Rescues typically rehome animals to new guardians, while sanctuaries accept animals for life but often have the least available space and the longest waiting lists. Both play an important role, and knowing the difference matters enormously when time is short.

Identify a first choice and a backup for both organizations and individuals. Follow their work, become part of their community, and support them when you can. Relationships built over time open doors that a cold call in a crisis often cannot. A sanctuary, rescue, or individual caretaker that knows you and your animals is far better positioned to help when the moment comes.

Check in with your contacts at least once a year. Lives change. Friends and family move, age, and face their own unexpected circumstances, and organizations may find themselves unable to do what they once hoped. A plan that was solid two years ago may need updating today. When you have identified your people and your organizations, prepare the paperwork from section 6 in advance for all of them so that transitions, if they are ever needed, can happen as smoothly as possible.

8. Your Animals' Introduction Document

Think of this as your animals' introduction to the world -- a short, ready-to-share profile for each animal that can go out in an email or be handed to someone at a moment's notice. If you do not have family or friends who are able to help, or if you have not yet found your ideal organization, this document becomes your most important tool. It tells your animals' story clearly and compassionately to a stranger who wants to help but needs to understand who they are taking on.

For each animal, include their name, age, species, breed, a recent photo, a brief description of their personality and needs, any bonded companions, and any special considerations a new caretaker would need to know immediately. Keep it simple, keep it honest, and keep it current. This is the document that travels ahead of you. Make it count.

9. Financial Planning

This section has a little more detail than the others, and intentionally so, because the financial piece is where most plans fall short. It is worth the read, because what follows may be the most important part of this entire guide.

Your best friend may love you deeply but may not have the resources to care for your horse for the next twenty-five years. Organizations may want to help but are limited by the resources available to them. A designated fund to support your animals' future care, discussed in advance with those who may one day be stepping up, is one of the most practical and loving gifts you can give them, and it can make the difference between an organization being able to say yes or having to say no.

If you become incapacitated and are no longer able to manage your animals' care:

Living trust that includes your animals. A living trust takes effect during your lifetime, which means it can protect your animals if you become incapacitated rather than only upon death. Assets held in a living trust transfer

to the named trustee without going through probate, making funds accessible much sooner than funds distributed through a will.

Formal pet trust. Recognized in most states and worth verifying in yours, a pet trust is the most legally enforceable option and is especially worth considering for horses, donkeys, mules, and other animals with long lifespans and higher care costs. It can include very specific care instructions, a named caregiver, and a trustee to manage the funds. Consider providing a copy to any organizations or trusted contacts who may be involved in your animals' future care, along with the name of a trusted contact person who can assist if you are not available.

If you pass away:

Payable-on-death (POD) account. The fastest and simplest option. Open a dedicated savings or money market account funded specifically for your animals' care and name your emergency caretaker, permanent caretaker, or a trusted organization as the beneficiary. You can split the designation between multiple people or organizations. Funds transfer directly upon death with no probate, no waiting, and no legal process -- the named beneficiary simply presents a death certificate to the bank.

Life insurance naming a trust or caretaker as beneficiary. If you do not currently have liquid assets to set aside, a life insurance policy naming your pet trust, designated caretaker, or a trusted organization as beneficiary is another meaningful path worth exploring. Payouts typically take weeks to a few months depending on the policy and claims process.

Provisions in your will. Including your animals in your will is important, but it should not be your only plan. Wills must pass through probate, which can take a year or more, and animals cannot wait. If your plan relies on funds passing through your estate, make sure a trusted person also has access to liquid resources in the interim so care never lapses while legal processes run their course.

We are not legal or financial professionals, and the options above reflect our own research as people who care deeply about animals and their futures. We share them in that spirit, and we encourage you to consult with an estate planning attorney, ideally one with experience in animal or agricultural law, to find the right fit for your situation. Laws and available tools vary by state, and a little professional guidance now can make an extraordinary difference for the animals you love.

10. Trusted Contacts

Identify a spouse, family member, close friend, or trusted advisor who understands your wishes, has access to your records, and knows where your folders are stored. Make sure your intentions are clearly communicated and in writing, not just understood informally. This is also the person who can reach out on your behalf to a sanctuary, a rescue, or a caretaker if you are no longer able to make those calls yourself.

For every person you name in this plan, take the time to identify at least one alternate. Life changes in ways none of us can predict, and the people we count on today may not always be available when they are needed most. A plan with a backup is a plan that can hold.

11. Emergency Caretaker vs. Permanent Caretaker

This is an important distinction. The person who can step in immediately in a crisis is not always the same person who would care for your animals long term, and that is completely okay. Both roles need to be named, prepared,

and willing before you need them.

For your emergency caretaker, make sure they have a basic care sheet for each animal posted and ready to go, including feeding amounts, routines, medications, and any important handling notes. Add them to your veterinary account so they are able to communicate directly with your veterinarian, and make sure your veterinarian has written permission on file to treat your animals if you cannot be reached. Consider also leaving a small designated fund your emergency caretaker can access immediately, without waiting on legal or estate processes, so care never has to pause while logistics are sorted out.

As with your trusted contacts, always name a backup for both the emergency and permanent caretaker roles. The goal is to create a plan that can hold steady no matter what life brings.

We recommend keeping all of this in one organized digital folder and one clearly labeled paper folder, sharing it with the trusted contacts and caretakers you have designated, and reviewing and updating it at least once a year or any time there are meaningful changes in your animals' care, health, or living arrangements.

Please remember that if you know the time is coming when you will no longer be able to care for your animals, earlier is always better than later. Giving the people and organizations who want to help you the time to prepare and work with you toward a realistic timeline is one of the kindest things you can do for everyone involved, most of all your animals.

At Tomten Farm and Sanctuary, planning ahead is something we think about every single day, for the animals in our care and for the animals still out there waiting for someone to think ahead on their behalf. If you have questions, need guidance, or simply want to talk through your own plan, we are always here. We would be honored to help.

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