

Attorney & Financial-Adviser Coordination Sheet

Use this worksheet to align a participant's estate plan, beneficiary designations, institutional records, and accepted Lifetime Care arrangements. It is a coordination aid—not a legal instrument or a substitute for professional advice.

CONFIRMED ORGANIZATION IDENTITY	
Cats in the City Rescue DBA Feline Transitions EIN 33-2724653	PMB 40571 Beaverton, OR 97008
Suggested unrestricted-purpose notation: Feline Transitions Lifetime Care Program	Confirm any restricted gift or proposed fiduciary/care role in writing before execution.

1. Participant and care plan

PARTICIPANT / GUARDIAN

DATE

CAT(S) COVERED

FELINE TRANSITIONS CASE NUMBER

2. Intended structure

Check each structure that must be coordinated. A pet trust holds dedicated property for identified animals. A charitable contribution supports the collective program unless Cats in the City Rescue expressly accepts a restriction in writing.

☐ Pet trust / trust amendment	☐ Unrestricted charitable contribution
☐ Testamentary direction	☐ Proposed restricted gift—written acceptance required

3. Instrument inventory

INSTRUMENT	OWNER / INSTITUTION	STATUS / CONFIRMATION
☐ Pet trust / amendment		
☐ Will / codicil		
☐ Life-insurance designation		
☐ Retirement-account designation		
☐ POD / TOD designation		
☐ Trustee or personal-representative direction letter		
☐ Restricted Gift Agreement, if accepted		

4. Required coordination decisions

Caregiver — Who is willing and practically able to receive each cat? Name successors.

Trustee — Who controls any dedicated trust property? Name successors and payment rules.

Enforcer — Who may enforce an Oregon pet trust? Keep this role distinct where appropriate.

Personal representative — Who carries out estate transfer directions and has current contact details?

Remainder recipient — Who receives trust property after the last covered animal dies?

Feline Transitions role — What role, if any, has the organization accepted in a signed program agreement?

5. Verification checklist

- Legal name is Cats in the City Rescue; DBA Feline Transitions is used only as an additional identifier.
- EIN 33-2724653 is entered accurately where a tax identifier is requested.
- The institution's controlling beneficiary form—not a will alone—has been completed and accepted.
- Primary, contingent, successor, and remainder roles are internally consistent.
- Any proposed restriction or special role has written organizational acceptance before execution.
- Redacted confirmation is uploaded to the private Guardian workspace; full account numbers and passwords are omitted.
- The participant understands that collective contributions do not create an individual care balance, escrow, premium, or refundable deposit.

6. Professional confirmation

ATTORNEY / ADVISER NAME AND FIRM

ROLE

EMAIL / PHONE

REVIEW DATE

OPEN ISSUES / FOLLOW-UP OWNER

IMPORTANT BOUNDARY

Do not name Feline Transitions as trustee, personal representative, attorney-in-fact, trust enforcer, owner, residential provider, caregiver, or restricted-gift recipient without prior written acceptance. Naming the organization or making a gift does not itself create a care, custody, residency, or fiduciary obligation.

This sheet is educational and administrative. It is not legal, tax, accounting, insurance, or investment advice. The participant's licensed advisers remain responsible for drafting and reviewing controlling instruments.