



What is an Ethical Will?

- **An Ethical Will IS**
 - A way to share your values, morals, beliefs, family history, life's lessons, hopes and dreams for the future, love, and forgiveness.
 - It is a values statement or a legacy letter to your spouse, children, grandchildren, other family members, friends, and/or community members.
 - It may share values or beliefs.
 - It may offer moral directives and hopes.
 - It may give reminders of family heritage.
 - It may provide encouragement to carry on a business.
 - It may explain why the author made certain choices during life.
 - It may express gratitude.
 - It is a way to be remembered from one generation to another.
 - It may share values or beliefs. It may offer moral directives and hopes. It may give reminders of family heritage. It may provide encouragement to carry on a business. It may explain why the author made certain choices during life. It may express gratitude.
- **An Ethical Will Is NOT**
 - A legal document.
 - An instrument to distribute money or assets upon your death.

Why Should I Write an Ethical Will?

We all want to be remembered by those we leave behind. The process of writing an Ethical Will helps the author focus on **what** he or she values the most and **how** he or she wants to be remembered. In addition, an Ethical Will often is therapeutic for the author, who gets to refresh his or her memories and values and think about what is important in life. It often times is the beginning of honest communication with loved ones, opening the door to future conversations. Finally, an ethical will may minimize the likelihood of a future family dispute. Many times, just knowing the author's thoughts and intentions helps families and loved ones heal from historical slights and wounds.

*"Traditional wills involve what you want your loved ones to have;
Ethical wills involve what you want them to know."¹*

How Do I Get Started?

Ethical wills generally take the form of a letter, but they are not limited to a single format. However, they can be essays, video, sound recordings, or handwritten snippets on scraps of paper or typed on a computer. They can be written in one sitting or edited and revised over time.

Below, I have outlined a few topics and questions that can help you get started.

Themes from the Past:

- Reminders (or first-time sharing) of personal or family stories;
- Lessons learned from personal or family experiences;
- Regrets;
- Explanations of why things happened the way they did;
- Profound or life-changing events; and/or
- Significant people in the author's life.

Themes from the Present:

- Expressions of love and affection for family members or others;
- Personal and religious values and beliefs;
- Expressions of gratitude;
- Stories that illustrate what the author believes in or values;
- Apologies; and/or
- Discussions of important charities, communities, education, vocations, vacations, relationships, etc.

Themes for the Future:

- Blessings, dreams, hopes, and encouragements for loved ones and community members;
- Advice and guidance;
- Encouraging pursuits in business or charitable endeavors;
- Requests to complete a mission or some other task; and/or
- Funeral wishes.

Barry Baines, the author of *Ethical Wills: Putting Your Values on Paper* recommends the following three approaches:

Approach 1: Start with an outline and a list of items to choose from.

Opening Thoughts:

- To my unborn child: I am writing this in eager anticipation of your birth. I know that I have much to learn about being a parent ...
- Dear family and friends: I leave to you these things that I have learned through my life ...
- Dear children: A few words to express my thoughts and feelings about what is important to me ...

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- To my family: In reading my ethical will, I hope you find few surprises because ..
- I want you to know how important you are in my life and how much I love you .

Values and Beliefs:

- Importance to author of certain family and community relationships;
- Religion/Spirituality;
- Importance of education/knowledge/learning;
- Specific values, such as respect for life, honesty, sincerity; and
- Learning from mistakes.

Lessons and Reflections About Life:

- Lessons;
- Reflections;
- Hopes for the future;
- Love;
- Forgiveness; and
- Requests.

Concluding Thoughts.

Approach 2: Start with writing exercises over a period of time and then use the content to start drafting your ethical will.

- Make a list of values;
- Write a paragraph or page starting with "What I believe or value the most is ... ";
- Write a paragraph or page starting with "What I did in my life to stand up for my values and beliefs is ... ";
- List and explain significant memories, events, mishaps, successes, and past experiences that helped shape your life;
- List favorite sayings and how they guided you;
- Think about important decisions you have made in your life and explain why you did them, whether in retrospect you would have done things differently, and what you can do now to change or improve the circumstances that resulted from your decisions;
- List hopes for the future;
- List what you learned from different people and events in your life;
- Answer the question, "What will I miss when I'm gone?" and
- Write what you would like to hear at your eulogy.

Approach 3: Start with a blank sheet of paper and just write.

Here are a series of questions that may provoke thoughts on items you may wish to include in your Ethical Will. Use any one or more of these to convey your thoughts.

1. Who do you love that you haven't told or are there loved ones to whom you wish to leave a written message or directive? If so, to whom and what??
2. What would you want them to know?
3. Is there something you will regret not saying if you were to die tomorrow?
4. Is there a loved one who needs your forgiveness, or from whom you want forgiveness?

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5. Who is the most influential person in your life?
6. Who has taught you the most?
7. What was the lesson they shared?
8. Whom do you admire the most? Why?
9. What is the best thing that anyone has ever said to you?
10. What is the greatest lesson you've learned?
11. What is your favorite quote or saying?
12. What is the funniest thing that ever happened to you?
13. What is the most adventurous thing you've ever done?
14. What was the best day of your life? Describe.
15. What was the worst day of your life? Describe.
16. What is your greatest accomplishment?
17. What, if any, regrets do you have?
18. Is there anything you need to confess before you die? Go ahead.
19. What would you have done differently in life?
20. Do you need to apologize and ask for their forgiveness now?
21. What will you regret in your life if you don't do or say it now?
22. What is your unfulfilled dream?
23. Who was our favorite teacher, and why?
24. What "best practices" did you learn from your parents or grandparents?
25. What historical person do you admire the most and why?
26. What lessons that you had a hard time learning do you want to share with someone else?
27. What is the most adventurous thing that you wanted to do but never did?
28. What are your best accomplishments in life?
29. Do you need to make amends with anybody or anything before you die?
30. What dreams have you not fulfilled that you want to pass on to any family members?
31. If you could spend sixty (60) minutes with someone who is no longer with you at this point, who is it and what would you talk about?
32. What are your strongest convictions, and why?

There is no right or wrong way to write an ethical will. There is no right or wrong time to write an ethical will. There is no right or wrong method or medium for writing an ethical will. Regardless of the where, when or how, it will be the most important thing your loved ones will receive from you.

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FOOTNOTES

1. J. Reimer and N. Stampfer, Ethical Wills: A Modern Jewish Treasury, 131 (1983).