

Writing Your Ethical Will

A workbook to help you get started



The JFCS Ethical Will Project is funded by a generous end-of-life grant from the CFSA Shaaron Kent Endowment Fund and supported by the Elder Alliance.





Welcome!

The following information will help you write an Ethical Will. You will also find an short helpful video at YouTube.com. Just type in "JFCS of Southern Arizona" in the YouTube search bar.

An Ethical Will is a personal document that communicates your values, experiences, and life lessons to your family. Its purpose is to leave a legacy to children, grandchildren, other family members, and/or friends.

For example: "My dear children, this is what I want from you. Be to one another good sisters and brothers. Your father and I love the three of you very much. We did our best raising you and gave you the best education that we could afford. Be good to each other, help one another if, God forbid, someone is in need. That is my wish. Love to all of you, Your Mother"

Following are examples of questions you can answer in your Ethical Will, which can be as simple or elaborate as you want. Think of it as something to bequeath values, not assets.

- What, and who, was important in your life?
- What is your heritage and your upbringing?
- What are your family values?

How long it takes to write an Ethical Will is up to you. It can take a day, months, or years. The length of the document is your choice as well; it can be a single page or many. There are no rules: add to it, change it any time you wish. We suggest that you start small, jot down notes, and add to it over time.

If you have high school or college age family members, they can start writing their Ethical Wills too. As they get older, and have more life experiences, they can add them to the notes they have underway.

This brief workbook will give you ideas that are suggestions only. There is nothing here that must be done. We have divided it into suggested sections; you choose what you write about.

When you are satisfied with what you have written, write it onto archival paper, which is available at craft and office supply stores. You can share the document now (preferably), or wait until after you are gone. Either way, make sure you store it in a safe place with instructions on

what to do with it. It's a good idea to update your ethical will every few years or so, or around the time of major life changes, such as marriages, childbirth, deaths, catastrophic events, special successes, as well as failures.

Salutation

Decide what salutation you want, if any. If you use a salutation, you can make it specific, e.g. Dear (husband, wife, children, grandchildren, etc.), or you can make it general, e.g. To my loving family, or To the most important person (people) in my life.

Your Past and Present

Write down a few memories. You can put in remembrances from your personal life, or memories that loved ones have shared with you. Below is a list of possible topics:

- Childhood memories
- School years
- Teenage years
- Young adult years
- Adult years
- Birth of a family member/friend
- Death of a family member/friends
- Family heritage
- Milestones
- Military service

Life Lessons and Achievements

A - Life Lessons

We have all been given words of wisdom in our lives.

- What was the best, or worst, piece of advice given to you?
- How did you respond?
- What advice have you given to family members or friends? How did they respond?

B - Growth from Losses and Failures

We have all experienced happiness, sadness, frustration, losses, failures, etc.

- How have you coped with these types of experiences?
- If you reflect back on these moments, have they helped you to grow in any way?
- What emotions did they bring out in you?
- How have your coping skills changed?

Write some notes about your feelings about how losses and failures have impacted you.

C - Achievements and Accomplishments

Think about what makes you proud.

- What have been some of your greatest accomplishments/successes?
- What have you learned from these experiences?
- What would you like to pass down so others can benefit from your accomplishments?

D - Gratitude

We have had challenges in our lives. We have had good in our lives.

- Considering the ups and downs in life, for what are you most grateful? It can be as simple as having a loving family, or having a roof over your head.

Personal Values and Beliefs

Think about your personal values and beliefs.

- What is most important to you, and what you want to pass on to family members/friends?
These are some sample values to help get you started.

Hard work

Faith

Loyalty

Friendship

Sense of humor

Respect

Tradition

God

Spirituality

Humility

Kindness

- What values/beliefs do you consider to be most important to you? Why?
- What values/beliefs do you want to pass down? Why?

- Who taught you about values/beliefs?

Hopes for the Future

Write down what your visions are for the future; for you personally, for family members/friends, for your community, etc.

- What are some of your hopes and dreams for the future?
- Do you want your family members to continue family traditions, or maybe to create new traditions?
- Do you want to get involved with charities, or perhaps start being charitable?
- Do you want to help others who are less fortunate?
- Do you want quarreling family members/friends to resolve their disputes?

Closing

You can close your Ethical Will in whatever way you wish. Simply say "I love you" or give thanks for everything you've been given. You can be serious or funny or choose to not have a closing at all.

The work of author, speaker and personal historian Beth LaMie is the inspiration behind this document. To learn more about Beth's work, go to <http://bethlamie.com>

Examples of Ethical Wills

A contemporary example of how much you can say in just one paragraph:

Dear ones,

I fully expect that I will live for a very long time, to see you well into adulthood and to share your future with you. There is much to look forward to, and I am planning on being part of all the adventures and all the challenges and all the joys. But if for some reason I am not, the most important thing you need to know is how much my love for you created the person that you will remember as me. I made you, but you made me, too. I am so proud of you and so grateful to you. When the time comes, and none of us can answer the question of when that will be, you need to know that without a doubt, I was fulfilled in my life. I have had a wonderful life and I don't want you to mourn me – maybe a little, but not too long! Carry me forward by re-creating the net that I was for you and be it for others. Carry me forward in your kitchen with our favorite coffeecake, muffins and pie, warm from the oven and made for your own delectable pleasure, or for those you care about. Carry me forward with an optimistic outlook and tenacious devotion to what you know is best. Carry me forward and I will be with you always.~Mother

We appreciate <http://www.personallegacyadvisors.com/> for the use of this sample ethical will.