

Creating An Ethical Will

A tool for passing onto our loved ones and future generations our memories, values and traditions

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Life, and the joy of life, is stored in our memories, hopefully, until our last day on earth. The memories, great experiences and lessons of our past, we are so fond of and, within us, carry deep meaning and relevance. Many times, it would be to our wishes that we shared these things with our loved ones well into the future. The wonderful times we shared with our family members and our friends, the things we learned and the things and values that we so dearly hold, we would like to pass onto future generations.

An ethical will is a very useful tool to accomplish this objective. Ethical wills are noted to have dated back to the Old Testament biblical times where it was a tradition to gather loved ones around the bed of a dying relative. The ethical will was an oral tradition where the dying family member would tell the loved ones important lessons and stories to carry on in the tradition of their family and future generations.

Now days, we utilize ethical wills to pass on these things in a form of a cherished gift to our loved ones. It is a gift in writing that shares great memories, important lessons, values of the family, wishes to be carried out, and proud traditions to be passed onto future generations.

Often times, members of families not only have wonderful memories and lessons to pass onto loved ones and future generations, but then find it to be it too late to do so because our lives have come to pass or our health has failed and we are no longer able to take the time to record these lessons and memories.

Writing an ethical will can be an emotional challenge because it acknowledges one's mortality and one's past. But an ethical will is a document that consists of heart felt words and involves passing on more than material things and money. Writing an ethical will is not a legal exercise, rather, it is a letter written from the heart sharing your most valued lessons and cherished thoughts.

It should be carefully crafted but it doesn't have any specific formula to adhere to. In addition, we recommend writing it in a storable writing medium that will signify great meaning and will last for many generations.

What to write in an Ethical Will

Although there aren't any specific topics to include in an ethical will, we have collected several ideas that you may want to consider to include in your document. Below is a list of topics and ideas that you may want to consider¹. Many of these questions and ideas were presented by Robert G. Alexander, in an article titled Ethical Wills: The Gift From The Heart, in the Journal Of Practical Estate Planning, April-May 2006

Topics to consider:

- What are the things I learned from my grandparents?
- Things I learned from my parents
- Lessons from my spouse, children and siblings
- What I learned from my experiences in life.
- I am grateful for...
- My most meaningful religious holiday experience or tradition is...
- What are some of the most important values that were passed onto you by your Grandparents and parents?
- What are some of the things about my heritage that define me?
- How much of a role does my heritage play in my life now?
- Where did you grow up, and how did this place shape the kind of person you became?
- What is an important lesson you learned in your early life and how does it continue to influence your beliefs and values? Who or what taught you these lessons?
- Who were the two or three most influential people in your childhood and how were they influential in shaping your life and values?
- Did you have an experience growing up that was life changing? If so, describe it and explain why it was significant to you.
- What are the three or four most important relationships in your life and why?
- Reflect on the past and describe which of your accomplishments that you find most gratifying.
- In looking to the future, name something you would like to accomplish or happen during the rest of your life.

- What do you feel are some of the most important qualities a person needs to live a rewarding life?
- What do you feel is a real measure of success?
- What was your greatest challenge during your life and what did this experience teach you?
- Describe your proudest moment and how it has affected your life and values.
- What are a few of the most important ideas or lessons you would like to pass onto your children, grandchildren or other loved ones.
- What was the single most important experience of your life and why was it so important to you?
- If you could pick three things that your family should remember about you what should they be and why?
- What do you appreciate most about money and why?
- What do you fear most about money and why?
- What do you want material gifts to be passed to your heirs to accomplish for them and why?
- What concerns do you have about the distribution of your material wealth as part of your legacy and why?
- What do you believe would be a foolish thing to do in arranging or leaving material gifts for your loved ones and why?
- What do you believe would be a wise thing to do in arranging to leave material gifts to your loved ones and why?
- What are the universal principles that hold your family together?
- What are you working for in life?
- What are the things missing in your life?
- What are the most important decisions you have made in your life and why?
- What are the best decisions you have made in your life and why?
- What are the worst decisions you have made in your life and why?

- Define your definition of success?
- What are your most unexpressed feelings and why?
- What do you want to achieve before you leave this life?
- What do you really love about your life?

The beginning of the will should address who you are writing it to and why you are writing it to them. Express your hopes and wishes for the future. What is your vision for your family in the future? How would you want them to remember along the way in their lives, things to watch out for, mistakes to avoid, how would you like to see them view and approach life. What are the important values that you think will help them become and continue to be exceptional human beings. Include family events and occasions. Include thoughts and words that have defined your own life. Who are some of the great people that have influenced you in your life and why did they do so? How did they impact you in becoming the person that you are? What efforts in your life really made you grow as a person and why?

You may want to end your ethical will with the most heart felt statement expressing your love for them and they are the ones that matter in your life.

Give yourself plenty of time to write your ethical will. You may want to start with an outline of the memories, lessons and other topics that you wish to document. But, when this wonderful document is completed, you will have created a valuable artifact to pass onto many generations.

1. Topics and questions obtained from article: Ethical Wills: The Gift Of A Heart, by Robert G. Alexander, from the Journal Of Practical Estate Planning, April – May 2006