

Ethical Will Worksheet

When you consider creating or updating your Will or Estate Plan, it's normal to immediately associate your planning with the legal ins-and-outs of passing along assets and property to heirs or ministries you care about. But have you considered the idea of an "ethical will?"

Sometimes also called a "legacy will" or "legacy letter," ethical wills give you an opportunity to pass along the values, guiding principles, memories and personal wishes you have for your loved ones. You could think of it this way: *Your Estate Plan is for dispersing your "things," but an Ethical Will is about communicating your heart.*

Creating an Ethical Will is a great way to communicate your personal story to your loved ones. It's also an opportunity to share the values you have held dear, and even a meaningful way to communicate just how much your loved ones have meant to you throughout your lifetime. An Ethical Will is also a good place to pass along small items of personal property that carry more nostalgia than financial value. This could include things like family photographs, recipes, clothing items, or other objects of sentimental value.

Where To Begin

Ethical Wills do not have a formal structure to follow — they're as different as the people writing them. You can type it or handwrite it into a journal. You could also record yourself on video or audio, create a poem or even a scrapbook. Just be sure whatever you create feels like a natural and true reflection of you. (That will also be part of the gift it is to your loved ones!)

Sitting down to a blank piece of paper can be very intimidating when you have a lot to say, or have trouble knowing where to begin. Here are some questions you can use as prompts to begin writing your Ethical Will.

What are some of your favorite things?

Examples: your favorite family vacation spot, artists, musicians, songs, memories, hobbies, etc.

What is important to know about your family?

Are there stories and memories you have from your grandparents, parents or children that future generations would like to know? What lessons (helpful, humorous or otherwise) did they pass down to you? Think about your life as a child, spouse, parent, grandparent, sibling, aunt or uncle, friend, etc.

How have your life experiences shaped you?

Consider these:

- *I am most proud of....*

- *I am most grateful for....*

- *My biggest failure/regret was... (and here's what I want to say to make it right)....*

- *The most difficult time in my life was....*

- *I would like to ask forgiveness for....*

- *The happiest time in my life was....*

What are your hopes for your family's future?

Consider these:

- *The values I want to pass along are....*

- *My wishes for my children/grandchildren/spouse are....*

- *I hope you get to experience....*

- *When you go through hard times, I hope you always remember....*

- *I sincerely believed in the work of [charitable organization or cause] and I hope you....*

However you decide to structure your Ethical Will, the important thing is to remember that every human has a deep desire for identity, mission and a sense of belonging — and your Ethical Will can bestow a blessing unlike any other. Don't be afraid to speak from your heart, be open, honest and vulnerable. The legacy you leave behind will not only provide stability and peace — it can be a gift that impacts confidence, hope, healing and encouragement into the lives of those you love most.