



# Ethical Wills Template

Writing legacy letters to your family  
(non-legal, non-financial)

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## Sections of an Ethical Will

1. Opening
2. Your History - Past & Present
3. Personal Values & Beliefs
4. Life Lessons & Achievements
5. Hopes for the Future
6. Conclusion

## Content of an Ethical Will:

1. Thoughts from the Past
  - a. Personal History
  - b. Family Stories
  - c. Lessons Learned or Regrets
2. Thoughts from the Present
  - a. Values & Beliefs
  - b. Expressions of Love & Gratitude
  - c. Forgiveness
3. Thoughts for the Future
  - a. Hopes for You & Your Loved Ones
  - b. Requests
  - c. Advice

## Basic Writing Guidelines

### 1. Brainstorming

*Write down several ideas*

### 2. Rough Draft

*Get your thoughts down on paper*

### 3. Revisions

*Make the story flow*

### 4. Editing

*Fine-tune the story*

### 5. Publishing

*Print or write a copy of your story*

# Composing Your Ethical Will

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Each of the following exercises will help you create your own ethical will. Choose which parts are relevant for you. Keep in mind that each person's ethical will is uniquely personal—no two will be alike—so you can add or omit whatever you want.

1. For each of the six sections, create a paragraph, a page, or more, in a way that expresses what you want to convey to your family and friends. It may be easier to write as if you are speaking to a specific person.
2. When you are comfortable with your message, write it onto archival paper, which is available at craft and office supply stores.
3. You can share the document with your loved ones 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.
4. Consider updating your ethical will every five years or so, or around the time of major life changes, such as marriage, childbirth, death, catastrophic event, successes, or failures.

## 1- Opening

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Choose one of the following salutations or something similar. You may want to address your ethical will to one particular person. Later, you can customize letters to others as you choose.

- ☐ To the most important person (people) in my life.
- ☐ To my loving family, these words are the legacy of love I leave you.
- ☐ Dear \_\_\_\_\_, [husband, wife, children, grandchildren, etc.] I want you to know what I learned in my life.
- ☐ A letter for my future generations.
- ☐ Dearest Children: A few words to explain the distribution of my assets.

## First Draft of My Opening:

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## 2- Your History - Past & Present

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Write down a few significant memories in the spaces below. Don't worry about sentence structure or punctuation. Consider times and events from your own personal history, or your ancestor's, and explain the importance.

Earliest Memories & Childhood	Marriage or Not Getting Married
Teenage Years	Becoming a Parent/Grandparent or Not
Early Adult Years	Family Heirlooms and Heritage
Middle/Later Adult Years	Milestones from History
Graduations	Military Service

## First Draft About My History - Past & Present:

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## 3- Life Lessons and Achievements

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### A- Life Lessons

What have you learned during your life, when, and from whom? Your life lessons often shape who you are and who you become. Everyone experiences and responds differently to life lessons. That is why they are such an important element of your Ethical Will. Share the details of your significant experiences.

*Example: I learned this from my father: find something you love to do, work hard, and be proud of yourself; only later did other people say girls aren't "supposed" to compete with boys. I proved they were wrong.*

### B- Growth from Losses and Failures

No one has a perfect life. There are trials and tribulations, heartbreaks, disappointments, tragedies, losses, and failures. Ideally, they become opportunities for reflection and growth.

Think about your challenges and the impact they have had on your development. Did you go under at first? Did you eventually overcome? Did you gain compassion, patience, or greater understanding? Maybe even wisdom? Were you bitter? Were you able to forgive others? Yourself?

*Example: When I lost my job (scholarship, love of my life, etc.), I discovered that... My illness (or divorce, or losing my breast) taught me the importance of...*

## C- Achievements & Accomplishments

What have been your proudest accomplishments and why? What can your descendants learn from your successes and missteps? Which achievements by your family have made you proud? How does having confidence in yourself lead you to more successes?

*Example: My greatest achievement has been....(e.g. going back to school, sacrificing for my children's education, overcoming certain challenges, working with troubled teens, etc.) In spite of a troubled youth, my son (daughter, uncle, friend, etc.) was able to...*

## D- Gratitude

What are you grateful for and why? Focus on the good in your life, even in the midst of challenges.

*Example: I am grateful for ... a warm bed ... a loving, supportive family ... and great friends. I am blessed to live in a country that allows freedom of speech and religion. I am fortunate to have been born with a few innate talents that led me to ...*

## E- Advice

What advice do you want your friends and family to remember? How can you help them in some way? Think about the wisdom you can bequeath to them. Flesh out your advice with stories and examples. What are your favorite poems, quotes, books, and why?

*Example: Always treat others as you want to be treated. A bird in the hand is worth two in the bush. Don't do anything you want to hide from your mother (father, grandchildren, etc.).*



Your personal values are unique to you, and they may vary from time to time. Every person responds differently to the influences in their lives and what life dishes out to them.

Look at the list of sample values below and mark the ones that resonate with you. Which ones can you relate to the most? Consider which personal values and beliefs you want to include in your Ethical Will. Feel free to choose other values as desired.

## Personal Values

Activism	Authenticity	Boldness	Can do attitude
Charity	Chivalry	Cleanliness	Communication
Confidence	Courage	Creativity	Curiosity
Dignity	Diversity	Empathy	Endurance
Enthusiasm	Excitement	Fairness	Faith
Friendship	Genuineness	God	Gratitude
Hard work	Helpfulness	Honor	Hope
Humility	Independence	Innovation	Integrity
Interest in others	Inventiveness	Joyfulness	Kindness
Lifelong learning	Listening	Love	Loyalty
Motivation	Nonviolence	Open mindedness	Organization
Participation	Patience	Persistence	Positive attitude
Pride (not ego)	Promptness	Quality	Resilience
Resourcefulness	Respect	Responsibility	Self-esteem
Sense of honor	Sense of humor	Supportiveness	Tradition

## Questions About Your Values

1. Which values are most important to you? Why?
2. From whom did you learn those values? How?
3. Which values do you want to see in others around you? Why?
4. In what ways do you act on your values?

### Additional Thought Prompts:

I value \_\_\_\_\_.

What matters most in life is \_\_\_\_\_.

I believe in \_\_\_\_\_.

The true meaning of my life is \_\_\_\_\_.

## First Draft About My Personal Values and Beliefs:



## 5- Hopes for the Future

Voice your hopes for the future, for you, your family, your community, and your world. Which hopes and dreams are most important to you for your vision of the future? Share the details of that vision in your ethical will.

My hopes and dreams for you	Continue/create family traditions
Help other by...	May your friends and family...
Stay involved with...	I hope you find work that...
Continue my charity work...	Find peace with...

### First Draft About My Hopes for the Future:

## 6- Closing

Decide on the closing message you want to use. It can be thought-provoking, amusing, serious, or whatever tone you choose. Try to instill a sense of hope and love for your family.

- ☐ I love you all very much.
- ☐ Thanks for all the wonderful memories.
- ☐ Think of me when \_\_\_\_\_.
- ☐ Don't do anything I wouldn't do, which leaves a lot of room.
- ☐ Remember me as \_\_\_\_\_.

## First Draft For My Closure:

## Website Resources

- Author's website for Beth LaMie, Author, Speaker & Personal Historian, where you can sign up for a free monthly newsletter with tips on writing family stories: [www.bethlamie.com](http://www.bethlamie.com)
- Association of Personal Historians (APH), which offers an anthology of personal stories: <http://www.personalhistorians.org/>
- Story of My Life.com. Free private website to accumulate all your family stories and invite participation from around the world. [www.storyofmylife.com](http://www.storyofmylife.com)

## Book Resources

- LaMie, Beth, *Granny's Guide to Fun and Fabulous Family Stories, For Kids from 8 to 98*. Solon, IA: Little Duck Publishing, 2010.
- LaMie, Beth, *The Essence of Ethical Wills: How to Write Legacy Letters to Your Family*. Coming in Winter 2011.
- Goldberg, Natalie, *Writing Down the Bones*. Boston: Shambhala Publications, 1986.
- Greene, Bob, and Fulford, D.G., *To Our Children's Children, Preserving Family Histories for Generations to Come*. NY: Doubleday, 1993.
- LaMott, Anne, *Bird by Bird, Some Instructions on Writing and Life*. NY: Random House, 1995.
- Yost, Paula Stallings, and McNees, Pat, Eds. *My Words Are Gonna Linger, The Art of Personal History*. Kennebunk, Maine: Personal History Press, 2009.

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