

ETHICAL WILLS TEMPLATE

Writing Legacy Letters to Your Family

(Non-Legal, Non-Financial)

By Beth LaMie

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

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

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.

1 *FIRST DRAFT OF MY OPENING:*

2 - Your History - Past & Present

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

2 *FIRST DRAFT ABOUT MY HISTORY - PAST & PRESENT:*

3 - Life Lessons and Achievements

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.

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?

*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?

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.

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 ...

4 - Personal Values and Beliefs

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.

Examining your own personal values allows you to figure out not only who you are, but who you want to become. Your values are determined by your heart, your family, your friends, your religion, and your community. They may be as ingrained in you as DNA.

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

<i>activism</i>	<i>authenticity</i>	<i>boldness</i>	<i>can do attitude</i>
<i>charity</i>	<i>chivalry</i>	<i>cleanliness</i>	<i>communication</i>
<i>confidence</i>	<i>courage</i>	<i>creativity</i>	<i>curiosity</i>
<i>dignity</i>	<i>diversity</i>	<i>empathy</i>	<i>endurance</i>
<i>enthusiasm</i>	<i>excitement</i>	<i>fairness</i>	<i>faith</i>
<i>friendship</i>	<i>genuineness</i>	<i>god</i>	<i>gratitude</i>
<i>hard work</i>	<i>helpfulness</i>	<i>honor</i>	<i>hope</i>
<i>humility</i>	<i>independence</i>	<i>innovation</i>	<i>integrity</i>
<i>interest in others</i>	<i>inventiveness</i>	<i>joyfulness</i>	<i>kindness</i>
<i>lifelong learning</i>	<i>listening</i>	<i>love</i>	<i>loyalty</i>
<i>motivation</i>	<i>nonviolence</i>	<i>open mindedness</i>	<i>organization</i>
<i>participation</i>	<i>patience</i>	<i>persistence</i>	<i>positive attitude</i>
<i>pride (not ego)</i>	<i>promptness</i>	<i>quality</i>	<i>resilience</i>
<i>resourcefulness</i>	<i>respect</i>	<i>responsibility</i>	<i>self-esteem</i>
<i>sense of honor</i>	<i>sense of humor</i>	<i>supportiveness</i>	<i>tradition</i>

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 others by . . .	May your friends and family . . .
Stay involved with . . .	I hope you find work that . . .
Continue my charity work...	Find peace with . . .

5 *FIRST DRAFT ABOUT MY HOPES FOR THE FUTURE:*

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
- 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

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 McNeese, Pat, Eds. *My Words Are Gonna Linger, The Art of Personal History*. Kennebunk, Maine: Personal History Press, 2009.

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