



ETHICAL WILL WORKSHEET

Leave a legacy of love
for the important
people in your life

Ethical Will Worksheet

What Is an Ethical Will?

When you consider creating or updating your will or estate plan, it's normal to immediately think of the legal ins and outs of passing along assets and property to heirs or causes 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 **guiding principles, memories and personal wishes** you have for your loved ones.

Your estate plan is for dispersing your "things," but an ethical will is about communicating what is in your heart.

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 write in on your computer or by hand in a journal. You could also record yourself on video or audio, compose a poem or even create a scrapbook. Just be sure whatever you create feels like a natural and true reflection of you, one more part of the gift to your loved ones!

Sitting down to a blank piece of paper can be very intimidating when you have a lot to say, or if you have trouble knowing where to begin.

Prompts to Begin Writing Your Ethical Will:

What are some of your favorite things?

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

What is important to know about your family or other loved ones?

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 loved ones' futures?

Consider these:

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

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

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

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

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

Every human being has a deep desire for identity, purpose and a sense of belonging, and your ethical will can bestow a gift 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.