
ETHICAL WILLS:

A HOW-TO GUIDE

“Tell me what you pay attention to and I will tell you who you are.”

- philosopher and essayist José Ortega y Gasset

STEP 1: SET ASIDE TIME TO REFLECT

If you're going to communicate the most important things about your life, you're first going to have to reflect on those things yourself. We suggest you intentionally set time aside (even if you need to schedule it on your calendar) to think about what is important for you to say, and to whom. Whether you create your ethical will all in one sitting or in stages, you will definitely need chunks of uninterrupted time in which to think and consider your life. Choose a quiet place that lends itself to contemplation.

STEP 2: WRITE DOWN ANSWERS TO THOUGHT-PROVOKING QUESTIONS

As you begin to think about your life, with its different highs and lows and the things you've learned through the years, it helps to ask yourself certain questions to get your thoughts flowing more freely. You don't need to go in any certain order or have the wording nailed down just yet, but writing out answers to these questions as you go will help you later on. Here are a few prompts that have helped us as we've created our own ethical wills:

- How do I see myself? What roles have characterized my life and been the significant expressions of who I am? (i.e. friend, businessman, mentor, parent, etc.)
- What are my highest values in life?
- How have these values played out in my life? (i.e. how have I lived them out)
- What am I most grateful for?
- Who were the most influential people in my life, and what did they teach me?
- What are difficult things I've experienced, and what did I learn from those things?
- What pieces of advice do I want to pass on; if I could help people remember a few crucial things what would they be?

STEP 3: ORGANIZE YOUR THOUGHTS WITH YOUR DESIRED AUDIENCE IN MIND

You've probably already imagined certain people hearing or reading your ethical will, but at this point in the process it's helpful to solidify in your mind who your audience is. Historically, ethical wills were written with the intent that they would be made public to extended family and community, but your ethical will can be for whom-ever you want.



Some may write their ethical will specifically with their children or grandchildren in mind, others for their friends and general circle of influence, while others may intend different portions of it to be addressed to different circles of people in their lives. There is no right or wrong, but when you know who you are addressing your ethical will to, it's easier to know how you want it to come across.

This is also a good time to consider where you hope your ethical will should be read (or played, if you decide to make a video or voice recording rather than writing it down). At your funeral? At a family dinner after your death? Each year on your birthday? At your church or place of business?

Knowing your audience and how it will be communicated helps you craft your ethical will in a relevant style and format.

STEP 4: RECORD AND PIECE TOGETHER THE DIFFERENT PARTS OF YOUR ETHICAL WILL

This brings us to the next step, which entails piecing together the different parts of your ethical will in an organized manner.

Each ethical will is personal to its creator; they aren't meant to look the same for everyone. Some people will include more information than others, and that's okay. You may come away from this process with a folder full of statements, letters to people, and stories about your history, while someone else may decide they only want to have one simple sheet which lists their top values. Those decisions are up to you.

We've seen many styles of ethical wills, and want to suggest a few things that could be great to include in yours. Again, this is just a list of possibilities, and you can pick and choose for yourself:

- A list of the values you hope your family or friends will continue to uphold after you've passed

- Important stories from your childhood that shaped you into the person you are
- A statement of faith (if you adhere to a particular religion)
- Private letters addressed to specific individuals in your life (with instructions for when they should read them)
- A list of resources (books, lectures, movies, music, etc.) that influenced you and that you feel would benefit others as well
- Your dreams and wishes for those you love as they move into the future
- General pieces of wisdom or advice you believe worthy of remembrance
- An explanation of who you were and why you did the things you did with your life

As we hinted at earlier, your ethical will can also be in different formats. If you have a hard time writing, maybe recording a video or audio file of yourself speaking is a better option for you.

STEP 5: PLACE YOUR ETHICAL WILL SOMEPLACE WHERE IT IS EASILY ACCESSIBLE

We suggest keeping your ethical will with the rest of your estate planning documents, so that it's obvious to your executor that it is to be part of the estate administration process when the time comes. If you don't keep it with your estate planning paperwork, be sure you put it somewhere easily accessible, and that at least one other person knows where it is.

STEP 6: TELL SOMEONE ABOUT YOUR ETHICAL WILL

We believe it's best to pick one person to be in charge of your ethical will (this could be your executor or someone else). Have a conversation with him or her so that they'll understand your ethical will's purpose and how important it is to you. We also strongly suggest you leave them a set of written instructions for how, when, and to whom you want it communicated.

STEP 7: UPDATE YOUR ETHICAL WILL REGULARLY

As long as you are living, you are learning. If you create your ethical will now, you may find that you think of more principles, stories, etc. through the years that you want to emphasize. Pull out your ethical will and peruse it every few years in case you need to tweak, add to, or cut parts out. This will also keep the most important things in your life fresh in your own mind.

THINGS TO CONSIDER ALONG THE WAY:

Keep the following in mind through each step of the process:

- Don't be afraid to share the negative: People can learn from your difficult experiences and past failures as much as, if not more than, your victories.
- Don't be overly concerned with writing or speaking "well": If you love playing with words, great! Make it as eloquent as you want. But don't get hung up on things sounding perfect. Just express yourself. When in doubt, simply speak from the heart.
- Since you can't say it all, pick the most important things: You are free to make your ethical will as long as you want, but chances are, you'll never be able to express everything you've learned or felt. If you want this to be something loved ones will remember, make it short enough that they can absorb it, but long enough that the most important things are communicated.
- Do not use your ethical will to judge, belittle, or give a person one last jab: Don't be the person that tries to take vengeance with their last breath. Your ethical will is meant to leave your legacy and a positive mark on those around you. We all see faults in the lives of other people. But words of kindness and wisdom will impact them much more effectively than your criticism.
- Find creative ways to express yourself: Help others remember that you were uniquely you. Some parts of your ethical will can just be fun! How about including a playlist of your favorite songs of all time, a page of quotes that inspired you, a list of your hidden talents or little known facts, your favorite fiction book with an explanation of why you loved it, pictures of the year you nurtured your most successful garden and a list of what you planted, a map highlighting all the hikes you did, etc.? Add in stories, jokes, or things that bring your humanity and personality into your ethical will. Be you.