



Ethical Will

An ethical will is a personal document you create to communicate your beliefs, experiences, life lessons and family heritage to your loved ones. A legal will focuses on passing along items of monetary value. An ethical will, on the other hand, serves to share guiding principles, memories, beliefs, stories, family objects with personal value, and future wishes for your family.

Writing an Ethical Will

Because an ethical will is not a legal document and is not made for the purpose of distributing assets, the content and form is up to you. Many people shape it as a letter to loved ones. Here are four themes you may wish to cover:

Beliefs and Values. What do you believe? What are your guiding principles when it comes to family life, work life, volunteering, handling money, etc.?

Life Lessons. What were some of the defining moments of your life? What experiences and people are you most grateful for? What are your hopes for your loved ones?

Personal Feelings. How can you communicate love to them? How have they impacted your life in a positive way?

Message of Hope. What are some of the most meaningful words that you have heard or read? What message of hope and encouragement do you wish to leave to your family and friends?