



Ethical Will Summary

Written by Robert D. Marple CPA

Whether we are rich or poor, the most valuable gifts we can give to our children, grandchildren, and those yet to come are the treasures of our memories, our stories, our values, insights and special wisdom. *Ira Byock, M.D.*

Dr. Byock has eloquently defined an ethical will. An ethical will is not a legal document and can be as simple as a few handwritten paragraphs left for a family member or close friend. There are no laws or rules for the creation of an ethical will, only suggestions and examples.

A heartfelt example would be the “Last Lecture” by Randy Pausch (the Carnegie Mellon professor who died of pancreatic cancer). Mr. Pausch provided a legacy to his family and students by preparing a final lecture to convey what was important to him and also share stories about his life. Mr. Pausch had created an ethical will.

We all know there are no guarantees for our time here though we often get lost in the day to day shuffle of what makes up our lives. Writing an ethical will not only benefits the end recipients (a link between past and present generations), it can also lead to an inward reflection of the writer’s own life.

An ethical will can be written free hand starting with only a pen and blank piece of paper, created from an outline, be typewritten, audio recorded, or videotaped. You may want a friend or family member to help you or to interview you.

A summary outline is attached with suggestions for the content and structure of your ethical will (remember there are no laws or rules for writing an ethical will). When writing your ethical will, you as the author should weigh your words carefully. Once you die you can not take your words back.

You do not need a completely finalized and polished product one week after you start. It is more important to get started now to ensure you have something. You can always add to your writing and improve it as time goes by.

Preservation of your ethical will should be a significant consideration. Regardless of your media choice (video or audio), you should also complete a paper document with your ethical will content. This document should be legible and on archival (acid-free) paper.

Archiving other content such as videotape or audiotape can be problematic because of changing standards. Additional information on this topic is widely available and enlisting a family member to take this responsibility to the next generation is suggested.

A great source for additional help on the writing of ethical wills is the book “Ethical Wills – Putting Your Values on Paper”, by Barry Baines, M.D. Dr. Baines is Chief Medical Officer of Ucare, Minnesota, and Associate Medical Director of Hospice of the Twin Cities. This book was used as a reference in writing this summary.

I hope you will consider creating an ethical will for a family member or loved one.



Ethical Wills

Content & Structures

Opening Thoughts

For whom
Purpose of writing
How you cared about this individual

Values & Beliefs

Importance of family
Importance of religion /spirituality
Importance of education & learning
Respect for life
Helping others
Respect for yourself
Honesty & sincerity
Saving money

Actions

Taking care of yourself
Learning from mistakes
Giving & receiving
Importance of laughing
Business lessons
Requests

Life's Lessons & Reflections

Lessons learned
Personal reflections
Hopes for the future
Love for family and friends
People or events shaping your life
Important decisions in your life
My happiest hours
Items you are grateful for
What you will miss when you are gone
Forgiveness

Other Items

Specific personal information (things done in your life)
Jokes you have played on people
Funny stories
Information to pass on (recipes, family tips, other)
Favorites (songs, food, other)

Concluding Thoughts

What would you like said at your own funeral
Who would you want to thank and let know you loved them