

Ethical Wills: Passing on Treasures of the Heart

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Unlike traditional wills that transfer worldly possessions, an ethical will bequeaths values, ideas, and personal reflections to family members and other loved ones. The history, practice and benefits of ethical wills are described, and two examples are provided. Ethical wills have been characterized as windows into the souls of those who write them, making these wills cherished by family members from generation to generation (Tiller 1996). Reinforcing the fact that one does not have to be wealthy to leave a legacy, an ethical will provides the writer a way to live on after death in the hearts and minds of loved ones and friends.

Quietly flakes of snow bounced off the large bedroom window. It was February 1921 and Tyrone knew he would soon die. Gently he ran his hand over the cover of the journal that had become his friend over the past two years. Soon after he learned his illness was probably terminal, he decided he wanted his family to have a part of him to hold onto long after he was gone. Tyrone penned an "ethical will" -- a document filled with thoughts, values, life events, and wisdom -- things that were important to him. It was his gift, a lasting heritage to his wife, their children, and their children's children. Now, some 70 years later, Tyrone's journal has aged, its pages brown and worn from the loving touch of many hands.

Unlike traditional wills that transfer worldly possessions, an ethical will bequeaths values, ideas, and personal reflections to family members and other loved ones. Longer ethical wills, such as Tyrone's, can include descriptions of significant events from one's lifetime.

But an ethical will need not be lengthy or time consuming to produce. A few well-stated paragraphs can be just as meaningful as numerous pages of writing. And you don't have to be an experienced writer to compose an ethical will. If the message you leave is from the heart, spelling and grammatical mistakes will be inconsequential to the loved ones reading your words.

A Sense of Control, Preparation, And Closure

An ethical will helps the writer confront and accept death in a healthy way. It also helps to provide a sense of control and a feeling of closure. This is important, because death is one of the things in life we have very little control over. We do not know when we will die, and we generally do not want to know. In fact, most of us avoid thinking about death as much as possible. Some individuals even believe that talking about death will hasten their own demise. Fear and dread of the unknown cause us to evade the topic of death.

Research supports the premise that attitudes toward death and dying affect one's longevity and general well-being. The role of attitudes adds a measure of control to your life, in that you can sometimes delay or hasten death by the way you feel about your own health or about death overall. For example, in one study (Sobel and Ornstein 1996), a positive outlook about their health was shown to prolong the lives of the subjects, even though they had been given less optimistic prognoses by their physicians.

Further substantiating these findings, Viktor Frankl (1962), well-known existential psychiatrist and concentration camp survivor, wrote that the risk of death in concentration camps was greatly increased if the prisoner could perceive no sense of purpose or meaning in life, both of which undergird personal control and militate against giving up.

In spite of the advantages (emotional, psychological, and financial) of preparation, most individuals choose not to plan for or talk about death. A good example of this relates to funeral arrangements. A recent research study (Bern-Klug 1996) shows that consumers usually overpaid for funeral arrangement expenses because of not preplanning for their funeral. In this study, more than 90 percent of the families met with the funeral home director for two hours or less in planning the funeral and did not shop around. This is in stark contrast to the many months the typical family spends making wedding plans by looking at numerous options and comparing prices. Those who do comparison shop and make funeral arrangements according to their own preferences can save thousands of dollars.

Adequate financial and legal preparation for death imparts a sense of control. The notion of "taking care of business" can be fulfilled through pre-planning a funeral, writing a will, purchasing adequate life insurance, and forming a trust or making other financial arrangements to ensure proper financial provision for survivors. Similarly, another practical and meaningful way to take charge and prepare wisely for death is through the penning of an ethical will.

An Ancient Tradition

Primarily a Jewish tradition, the roots of which stem from early Biblical times, ethical wills have gained broad popularity in recent years. The earliest ethical wills were most likely passed on orally, while those of later generations were recorded on paper. Actual wills dating from the Medieval and Renaissance periods have even been preserved to modern times.

Jack Riemer (1991), co-author of *Ethical Wills: A Modern Jewish Treasury* (1983), has found that ethical wills may be more commonplace today than most of us realize: "I was on the Today Show, talking about this custom. And for two weeks after the broadcast, I was inundated with letters from all over the country, from people who wanted to tell me that they had ethical wills in their possession They all said that they treasured these wills and took them out and reread them often."

An Expression of Your Unique Personality

There is no magical formula that dictates the format or content of an ethical will. What is important is that it expresses the essence of your heart and your personality. If you enjoy writing poetry or songs, consider including an original composition in your will. If you are not good with written words or you are no longer able to manage a writing instrument, try dictating your ethical will onto a cassette tape or use a video recorder. Perhaps your penmanship is poor; think about using a typewriter or word processor. Your creativity is your only limitation.

You can address your ethical will to your spouse or children, to a special friend, or "To My Family." Of course, you may wish to compose more than one ethical will. Listen to your inner guidance; you will know how to proceed.

To be certain that your ethical will remains intact for many years to come, use acid-free paper that will not disintegrate, mold, or fade. Think about the size and type of paper as well. You may prefer a bound book over loose-leaf sheets, and you should use only high-quality, fade-resistant ink.

What You Have to Say Is Important

If you're thinking to yourself, "Well, I don't really have anything all that important to write about," think again. You are unique! You have lived and learned in your own special way, and you have important thoughts, experiences and feelings to pass on to those around you. To write an ethical will you don't need to be a sage or a saint; you just need to be yourself. Open your heart and write what comes; it will be a gift and a legacy, "a window into your soul" that loved ones will cherish.

What to Include

What you choose to include in your document will help determine the length of your ethical will. Describing life events, goals, values, and beliefs could require a lengthy will. This type of ethical will can offer rich insights and information that will be highly coveted by future generations. However, many individuals prefer to keep it short and simple, or to address specific topics such as "My Definition of True Success," "Why I Love You and Will Miss You," "What I Appreciate Most," "Mistakes I Have Learned From," "What Spirituality Means to Me," or "My Happiest and Funniest Moments." Consider including stories with deep personal meaning, your ancestral background, people or events that helped shape your life, familial obligations, favorite scripture passages, or even actions for which you would like to ask forgiveness.

After you have brainstormed, you may find it helpful to write each theme you plan to use in your ethical will at the top of a separate piece of paper, using the space below for an outline of details, anecdotes, and favorite sayings that support this theme. This will help you organize your ideas and make it easier to write a clear, cohesive, and meaningful ethical will.

Physical And Emotional Benefits

James W. Pennebaker, a Professor of Psychology at the University of Texas, has been at the forefront of recent studies that have documented the benefits of writing about emotionally significant and personally meaningful topics. For example, in one of Pennebaker's experiments (Pennebaker 1997), people who wrote about their deep feelings showed strikingly improved immune functions based on blood tests. Those who only jotted down trivialities failed to receive a boost in immune functioning. Six weeks after the journalists stopped writing, the findings still held -- and those who expressed themselves in depth had made fewer doctor visits.

Dozens of similar studies have now been conducted by investigators around the world. Often in these experiments the focus of the writing is a traumatic or difficult-to-deal-with event. Collectively, the results indicate that from-the-heart writing can offer a variety of mental and emotional benefits as well as often providing small enhancements in physical well-being (Pennebaker 1997). It is logical to assume that the preparation of an ethical will may also offer similar benefits.

It Takes Courage

In composing an ethical will, you come face to face with your life and your mortality. You realize that we all live in the shadow of death, and that each day of life is a precious opportunity. Rabbi Jack Riemer speaks to this challenge:

An ethical will is not an easy thing to write. In doing so, one confronts oneself. One must look inward to see what are the essential truths one has learned in a lifetime, face up to one's failures, and consider what are the things that really count. Thus an individual learns a great deal about himself or herself when writing an ethical will.

(Riemer & Stampfer 1983).

It's Never Too Soon

Writing our ethical wills is not something we should put off. Death can be sudden, even for teenagers and younger children. Also, it's often best to write important material like this when we are fresh and unpressured by time. Starting early in life to write your ethical will can give you more time to record feelings from your heart as well as to interject pertinent historical facts.

Remember, too, that sometimes very late in life our mental and physical capacities diminish, making it difficult or even impossible to prepare an ethical will. An ethical will is a gift to both the giver and the receiver. It helps us clarify our values and put life in perspective. Writing an ethical will is a healthy, healing exercise. Don't put it off; it's never too soon. Look ahead on your calendar: Set aside some time to get away and be by yourself with pen and paper in hand.

Weigh Your Words Carefully

Carefully weigh your words before you decide to actually use them. Be aware of the potential damage ethical wills could produce if wielded as a weapon from the grave to control and chastise the recipient. Such abuse of a rich tradition could be damaging. Remember, once you die, you cannot take back anything you say. Of course, it will be up to you to decide the best time to share your ethical will. If you choose to present it before your death, you may want to consider leaving a second will to be read upon your death. Likewise, you should update the will whenever you feel the need.

Examples of Ethical Wills

Following are two examples of brief ethical wills. Please note the wide variety of sentiments and ideas that can be expressed using this means.

Dear Anna, Peter and Eddie,

Although I have recently been diagnosed as a man in "tip-top condition" by Dr. Lewis, I am nonetheless reminded that time is still passing, and in a couple of years I will have to retire from

commercial farming. Don't worry; I'm leaving farming with little in the way of regrets. It has provided your mother and me with enough money to retire.

While tobacco and dairy farming gave my grandfather, father, and me a solid, respectable way to care for our families, I know each of you has other plans for your future. I want to say that I am not disappointed in any of my children for choosing other ways of life. You have each made me proud in your own way.

I am a quiet man, and I know I have never offered much in the way of spiritual guidance. However, I hope that my manner of living has served as a living example of my own moral code.

As you know, this family has had its roots here at Otter Creek since your great-grandpa Jack settled it way back in 1867. I certainly don't expect you to keep the farm; I realize that even little Eddie will follow his big brother and sister to the city. My only request is that the house and the 15 surrounding acres be preserved as a family vacation spot. I want you to bring your children to relax, fish, swim, and have fun pursuing life's simple things, but most importantly, to stick together as a family.

*I love you all,
Dad*

Dear Kids,

I won't take up much of your time. I know I wasn't around much while you were growing up, so why should I preach to you now?

My wish is that you do not make the mistake of staying in a job that consumes your life, especially if the job offers you nothing more than financial security. You will just end up stressed out, emotionally drained, and most importantly, ten to twenty years of your life will be behind you, used up, never to be relived.

Obi, please continue to pursue your interests in community service and acting; Abdul, I hope you stick with the violin and music which bring you so much happiness. If you both focus on things that are important to you, failures may come, but they will be fewer.

Don't let yourselves be easily discouraged. If you gauge your achievements on those of others, you will most likely be disappointed. Stand on your own merit and accomplishments. Trust me on this one; I know from experience.

I will always be proud of both of you. Stay true to yourselves and give your best effort. As you know, I have left you both money to cover your college education. Use this time to study things that interest you. Don't try to live up to the expectations of others as I did. Pursue your chosen path, and use your college education to get you started.

Love always,

Mom

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