



## Congregation Chaverim

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### Writing an Ethical Will

#### The Book of Jewish Sacred Practices, CLAL

The lessons we teach can live on after us. In writing an ethical will, a traditional Jewish practice, we can spell out the values that we hope our loved ones will embody in their lives. One day this intimate letter will pass into the hands of those we leave behind. In the meantime, writing it will remind us of those values by which we strive to live.

#### Meditation

Help me to express the deepest and most important values that I seek to embody in my own life and to transmit to my loved ones. When the time comes, may my loved ones receive my words, and may they be sustained and strengthened on their lifelong journeys.

#### Rituals

Set aside some private time, taking a few minutes to center yourself. Reflect upon the sacred purpose that is at hand.

Begin composing your ethical will. (You can write, tape, or video it.) These questions can help you get started:

- What are the important things you have learned in life?
- What traits do you admire most in others?
- What important work have you begun that you hope your descendants can complete?

You need not finish the ethical will in a single session. You can redo or revise it as the years pass. Feel free to reread it from time to time, drawing strength of purpose from it. It is, after all, your own ethical mission statement.

When complete, place your ethical will with your most important papers. You might want to attach it to your legal will so it will be found at the proper time.

#### Blessing (when you have composed your ethical will)

Blessed in the One who enables me to express the ideals that are my life and my soul.

#### Teaching

At my grave, and throughout the whole year, and then every year on the anniversary of my death, my remaining son and my sons-in-law, if they are so inclined, should say *kaddish* for me. And if they do not wish to do this, or if it is against their religious convictions, they may fulfill their obligation to me by assembling together with my daughters and grandchildren and good friends to read this testament, and also to select one of my stories, one of the really merry

ones, and read it aloud in whatever language they understand best, and let my name rather be remembered by them with laughter than not at all.

## **Writing an Ethical Will**

**Happier Endings, Erica Brown**

### **Personal Information**

- Birthdate, birth place, information about your hometown
- Favorite photo of yourself and why
- Your personal story/history
- Transformative events in your life
- Historical events that you lived through that shaped the way you think and act
- Objects of significance that tell a piece of your life story. This may also be a way to give away objects of emotional significance rather than material worth. You may want to attach the object to a story and a blessing

### **Personal Happiness and Satisfaction**

- Most impactful quote
- Places of significance to you and why
- Small things that have brought you happiness
- Favorite or important rituals
- Role of religion/spirituality in your life
- Favorite prayer

### **The Role of Others**

- Enumerating what you love about each person who is significant in your life
- Thanking and acknowledging what each significant person in your life has brought to you
- What you learned from your parents
- What your children taught you
- Thoughts on family

### **Life Advice**

- Your spiritual values or rules you live by
- Your life advice about friendship
- Your life advice about love/marriage
- Your life advice about work
- Your life advice about education/knowledge

### **Finances**

- Most important charitable causes and why
- How you used money to make a difference
- Your life advice about money

### **Forgiveness**

- Regrets

- Mistakes
- Request for forgiveness generally or from certain individuals
- Granting of forgiveness generally or to certain individuals

**Burial Requests**

- Type of burial
- Location of burial
- Requested speakers at the funeral
- Requested rituals at the funeral, including prayer, poems and songs to be included

**Wishes for the Next Generation**

- \_\_\_\_\_
- \_\_\_\_\_

**What You Will Miss Most**

- \_\_\_\_\_
- \_\_\_\_\_

Sounds of the Shofar: Tekia: What has kept you whole in life? Sh'varim: what experiences have made you feel broken? Terua: What are some of your regrets? Errors? Mistakes? Tekia: what makes you laugh, smile, feel joy?

**A Sampling of Ethical Wills over the Centuries: listen for a phrase or word that you might want to write down.**

Guide for writing ethical wills: the formative events in my life....the people who influenced me the most....the people in our family and the causes for which I would like you to feel a sense of responsibility...the mistakes I most regret having made in my life and that I hope you will not repeat...the important lessons that I have learned in my life...I would like to ask your forgiveness for...and I forgive you for.....

**How to organize the ethical will:**

1. Opening: I write this to you, my \_\_\_\_\_ in order to \_\_\_\_\_
2. The Family: my parents, siblings, antecedents....were/are.....events that helped shape our family....
3. Personal history: people who strongly influenced m life.....events which helped shape my life.....
4. Religious observance, insights: the rituals of most meaning to me.....specific teachings from Jewish, your religion or philosophy, that most moved me...
5. Ethical ideals and practices: ideals that found expression in my life....I would like to suggest to you the following...
6. Family Anecdotes or expressions to share....
7. Closing: my ardent wishes for you....
8. Personalize and strengthen these observations with shared family memories, personal stories and favorite sayings, enhancing the will throughout, 6 above

Write the will on acid-free paper.

Attach the ethical will as a codicil to your will concerning division of your property. Also, if you realize that there remains unfinished business between you and your children, family, now is the time to make an effort to resolve the issues and make peace.

**So That Your Values Live On: Ethical Wills and How to Prepare Them** Rabbi Jack Riemer and Nathaniel Stampfer

## **Welcome! Read on for information about you can create your Ethical Will.**

An Ethical Will is a personal document that communicates your values, experiences, and life lessons to your family. Its purpose is to leave a legacy to children, grandchildren, other family members, and/or friends. These are examples of questions you can answer in your Ethical Will, which can be as simple or elaborate as you want. Think of it as something to bequeath values, not assets.

- What, and who, was important in your life?
- What is your heritage and your upbringing?
- What are your family values?

How long it takes to write an Ethical Will is up to you. It can take a day, months, or years. The length of the document is your choice as well; it can be a single page or many. There are no rules: add to it, change it any time you wish. We suggest that you start small, jot down notes, and add to it over time.

If you have high school or college age family members, they can start writing their Ethical Wills too. As they get older, and have more life experiences, they can add them to the notes they have underway.

This brief workbook will give you ideas that are suggestions only. There is nothing here that must to be done. We have divided it into suggested sections; you choose what you write about.

When you are satisfied with what you have written, write it onto archival paper, which is available at craft and office supply stores. You can share the document now (preferably), or wait until after you are gone. Either way, make sure you store it in a safe place with instructions on what to do with it. It's a good idea to update your ethical will every few years or so, or around the time of major life changes, such as marriages, childbirth, deaths, catastrophic events, special successes, as well as failures.

## Salutation

Decide what salutation you want, if any. If you use a salutation, you can make it specific, e.g. Dear (husband, wife, children, grandchildren, etc.), or you can make it general, e.g. To my loving family, or To the most important person (people) in my life.

## Your Past and Present

Write down a few memories. You can put in remembrances from your personal life, or memories that loved ones have shared with you. Below is a list of possible topics:

- Childhood memories
- School years
- Teenage years
- Young adult years
- Adult years
- Birth of a family member/friend
- Death of a family member/friends
- Family heritage
- Milestones
- Military service

## Life Lessons and Achievements

### A - Life Lessons

We have all been given words of wisdom in our lives.

- What was the best, or worst, piece of advice given to you?
- How did you respond?
- What advice have you given to family members or friends? How did they respond?

### B - Growth from Losses and Failures

We have all experienced happiness, sadness, frustration, losses, failures, etc.

- How have you coped with these types of experiences?
- If you reflect back on these moments, have they helped you to grow in any way?
- What types of emotions did they bring out in you?

- How have your coping skills changed?

Write some notes about your feelings about how losses and failures have impacted you.

**C - Achievements and Accomplishments**

Think about what makes you proud.

- What have been some of your greatest accomplishments/successes?
- What have you learned from these experiences?
- What would you like to pass down so others can benefit from your accomplishments?

**D - Gratitude**

We have had challenges in our lives. We have had good in our lives.

- Considering the ups and downs in life, for what are you most grateful? It can be as simple as having a loving family, or having a roof over your head.

**Personal Values and Beliefs**

Think about your personal values and beliefs.

- What is most important to you, and what you want to pass on to family members/friends?

These are some sample values to help get you started.

- Hard work
- Faith
- Loyalty
- Friendship
- Sense of humor
- Respect
- Tradition
- God
- Spirituality
- Humility
- Kindness

- What values/beliefs do you consider to be most important to you? Why?
- What values/beliefs do you want to pass down? Why?
- Who taught you about values/beliefs?