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Ethical Wills Provide a Bridge to Loved Ones

By Casey Schacher

My mother recently told me that she writes down feelings, thoughts and reflections so that I can read them when she dies. "They're just scattered around the house, in notebooks, on napkins, anywhere really ... for when I'm not here anymore," she said. Though she does not realize it, my mom has created the makings of an ethical will that will someday serve as a gateway to the mind and heart of the woman I love most.

Ethical wills are not legal documents but rather unofficial manuscripts that bequeath personal experiences, advice, blessings, beliefs and values to loved ones. They are often in letter form but can range from short paragraphs to bound volumes.¹ They can include photos, drawings, news articles or anything the author feels to be important. Frequently intended to compliment legal and living wills, ethical wills can also be shared with family and loved ones during life.

Ethical wills are part of an ancient and honored tradition that provides a method of passing non-material resources down to future generations. The Hebrew Bible mentions ethical wills about 3,000 years ago when elders and leaders passed on blessings, prayers and advice to family members and disciples.² Similarly, the Christian Bible holds passages portraying ethical wills, although in both cases the tradition began orally and was later recorded by religious leaders.³ In the 11th century, the first paper-based ethical wills appeared.⁴ Later still, biographies and excerpts regarding the values and beliefs of the writers began to be included in these texts during the twelfth and fourteenth centuries.⁵ Medieval women, who were often unable to write legal wills or distribute property to children, used ethical wills as a way to pass along "moral" assets.⁶

The last few decades have witnessed a reemergence of the ethical will tradition. Awareness has grown as baby boomers care for aging parents and contemplate their own mortality and legacies.⁷ Catastrophic events and political unrest in recent years have also spurred significant interest. Dr. Barry Baines, author of "Ethical Wills, Putting Your Values on Paper," saw traffic to his Web site (www.ethicalwills.com) triple following the September 11, 2001, terrorist attacks.⁸ He also notes that "natural disaster such as the tsunami and Hurricane Katrina leave people with the thought that you can be here one day and gone the next."⁹ Whatever the reason, people are increasingly seeing ethical wills as a way for deeper, more meaningful communication with families and loved ones during times of fear and crisis.

Although ethical wills can be about any subject, there exist a few common themes that can help start and guide the writing process:

- Values and Beliefs: What you think is most important in life
- Lessons Learned: What life has taught you
- Love for Survivors: What your family and friends have meant to you, and what you hope for them in the future
- Forgiveness: What you would like to forgive—and be forgiven for
- Explanations: Why you made the choices you did
- Anecdotes: Stories about important moments that enriched or shaped your life, or humorous events you want preserved as family lore.¹⁰

Due to the highly personal nature of ethical wills, there are certain dangers that should be considered when writing and sharing these memoirs. First, survivors may not be ready to read what has been written, especially if the author is no longer alive to explain or clarify the information provided. Also, ethical wills can be used as a way to exert control, denounce survivors or make the readers feel guilty without providing them with the ability to respond, resulting in what Baines calls "unethical" wills.¹¹ In many instances, special care may need to be taken to consider the feelings and concerns of the intended audience and to ensure that the document will enrich those who read it.

For this and many other reasons, some choose to share their ethical wills while still alive. An ethical will does not necessarily need to be written as a final farewell at the end of life but can rather be a means to celebrate or mark important periods of time as they occur. For example, people often create ethical wills at the birth of a child or grandchild, to seek a deeper bond in marriage or to reflect on life during divorce or when entering a new phase of life.¹² The benefits of ethical wills can therefore be experienced while the author lives, and readers can have an opportunity to provide feedback and reflection about what they have read.

Although I'm saddened to even think about the day my mother will pass on, I am touched and comforted by the thought that pieces of her—her heart, her soul and her mind—are scattered about her house waiting to be gathered, collected and cherished by my family. I can almost picture the smiles, tears and laughter that await us as we will look over her ethical will and hear her voice, as clear and true as the words on the paper, saying for one final time how much she loves us.

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