

# PASSING ON MORE THAN MATERIAL WEALTH

## AN ETHICAL WILL WORKBOOK



Your Trusted  
Charitable  
Partner

JEWISH  
FOUNDATION  
OF MEMPHIS

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This publication was originally created by the Jewish Community Foundation of Los Angeles. We welcome its distribution in collaboration with philanthropic organizations committed to enriching and strengthening Jewish communities for future generations.

# BACKGROUND



**An ethical will, also known as a legacy letter, is an opportunity to preserve meaningful parts of your life and legacy. Ethical wills are generally written for the benefit of loved ones and can be directed to children, extended family, friends, or other groups/communities. They are a way of expressing and transmitting one's history, principles, values, and wishes beyond those in a legal will or trust. Ethical wills can be shared with loved ones during life or after one's passing.**

The ethical will is a tradition with Jewish roots. The Torah, Talmud, and medieval and modern Jewish literature all contain examples of ethical wills. However, there is no standard structure for an ethical will, so you may personalize it to fit your needs.

This workbook is organized into five sections: Family History, Personal History, Spirituality, Philanthropy, and Wishes & Intentions. Each section contains six areas of inquiry for you to explore, for a total of thirty prompts. At the end of this workbook, you will find a list of further resources that you may find helpful.

It is a good idea to think about your intended audience before beginning the process of creating your ethical will; this will help you determine how much context or detail would be helpful to include.

You do not need to answer every question in this workbook; feel free to skip whatever you feel does not apply to you. If a particular question moves you to write about a different subject altogether, go for it! You can be as brief or elaborate as you like. However, consider enhancing your responses by providing context, detail, and stories, as it will be more meaningful for you and your intended recipients.

It is normal to feel overwhelmed or emotional when working on your ethical will. It is okay to take breaks. It can be an ongoing process and does not need to be completed in one sitting. Don't worry about writing a perfect first draft — just start writing and know that you can continue and revise later. The Jewish Foundation of Memphis team is always here to answer any questions. We hope that the process of creating your ethical will is as meaningful for you as the end product will surely be for your loved ones.

## WORKBOOK INSTRUCTIONS

Please write your answers in the blank spaces provided below each question. Should you need more room to elaborate or expand upon your answers, we've provided extra pages at the end of this workbook.

# MY LEGACY LETTER

TO:

FROM:

NOTES:



# **SECTION ONE** **FAMILY** **HISTORY**



## SECTION ONE

# FAMILY HISTORY


- 1 Have you created a family tree?



- 2 Are there stories or lessons passed down to you from your parents/ grandparents/great grandparents that resonate or stand out?

## SECTION ONE


# FAMILY HISTORY

- 
- 3 What non-monetary things have you inherited (e.g., values, beliefs, character traits)?

- 4 Are there family traditions or rituals that you especially enjoy?  
Any that you hope will continue after you pass?

## SECTION ONE

# FAMILY HISTORY

- 
- 5 If you are/were married or have/had a life partner, are there any stories or lessons from your relationship that you wish to share?

- 6 If you have children/grandchildren, are there any favorite memories with them that stand out?

# **SECTION TWO** **PERSONAL HISTORY**





## SECTION TWO

# PERSONAL HISTORY

1

What are your favorite childhood memories?

2

Which friendships have been most meaningful to you? Are there other relationships that have been particularly significant to you (*teacher/student, mentor/mentee, co-worker, neighbor, etc.*)?

## SECTION TWO

# PERSONAL HISTORY

3


What are your thoughts about your education? Any memorable books, courses, or instructors?

4

How did you come to your career? Are there any specific people, events, or values that influenced/guided your decision? What career accomplishments are you most proud of and which memories stand out?

## SECTION TWO

# PERSONAL HISTORY

- 
- 5 Were there any significant hardships and challenges you faced that led to insights or personal growth?

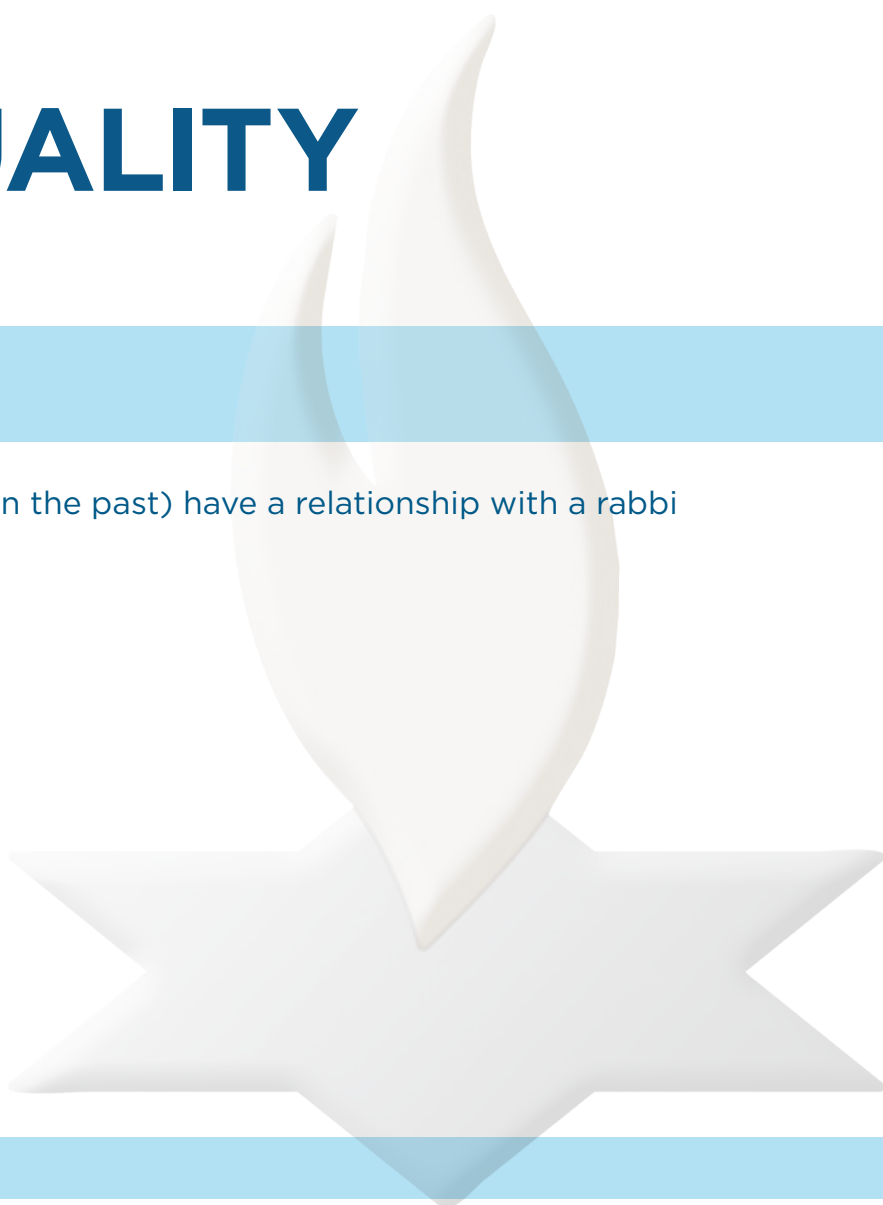
- 6 Are there any hobbies or trips that have been particularly meaningful in your life? What made them special?

# **SECTION THREE** **SPIRITUALITY**



## SECTION THREE

# SPIRITUALITY

- 
- 1 Do you (presently or in the past) have a relationship with a rabbi or synagogue?

- 2 Who taught you about Judaism? What does Judaism mean to you?

## SECTION THREE

# SPIRITUALITY

- 
- 3 Is your relationship with Judaism/spirituality different from your parents' one?

- 4 Are there religious/spiritual traditions that are particularly important to you?

## SECTION THREE

# SPIRITUALITY

5

Are there Jewish values that have special meaning to you?

6

Have you been to Israel? What was it like?

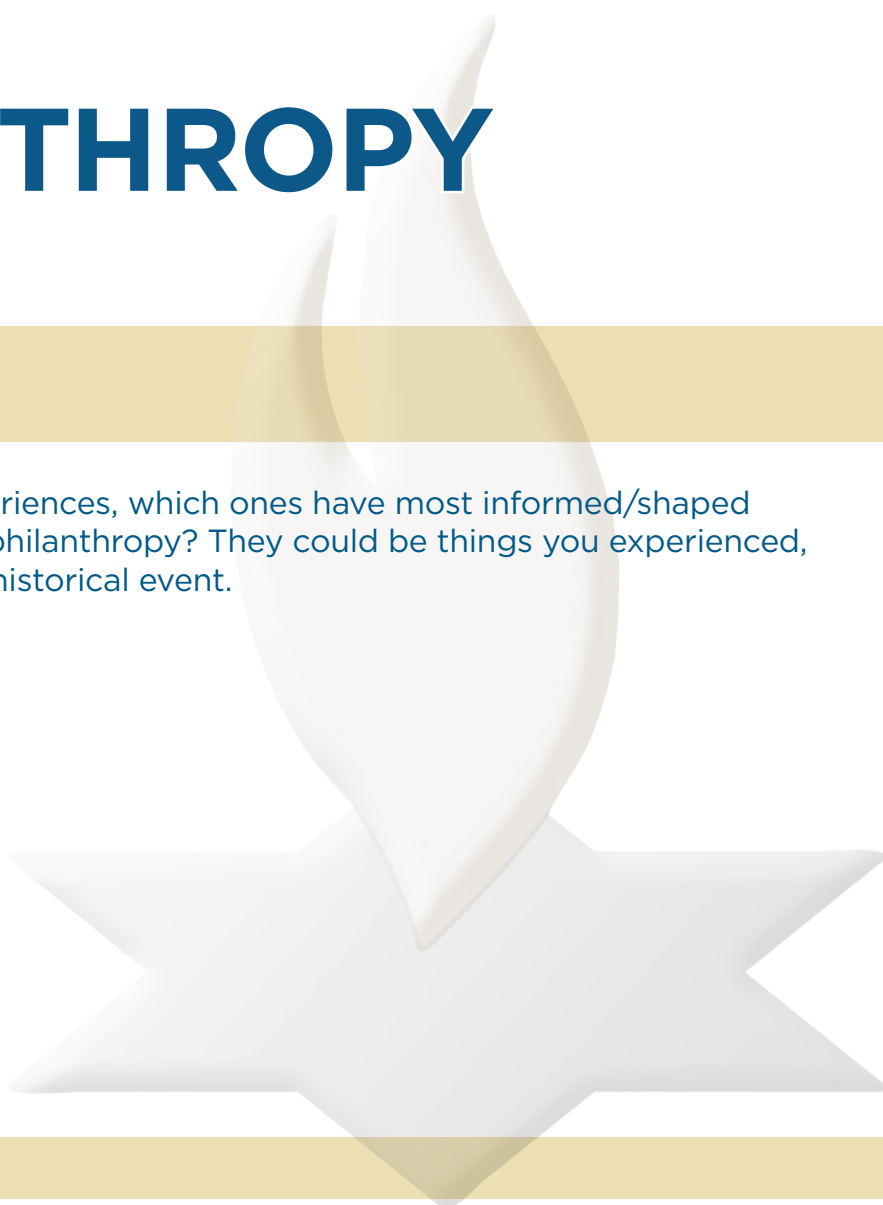
# **SECTION FOUR** **PHILANTHROPY**





## SECTION FOUR

# PHILANTHROPY

- 
- 1 Of your personal experiences, which ones have most informed/shaped how you think about philanthropy? They could be things you experienced, heard, read, and/or a historical event.

- 2 Is there a mindset about money or finances (inherited or self-developed) that contributes to your views on philanthropy?

## SECTION **FOUR**

# PHILANTHROPY

- 
- 3 Are there any relationships that have influenced or inspired your philanthropy?

- 4 Are there charitable organizations or areas where you have given consistent or significant gifts?

## SECTION **FOUR**

# PHILANTHROPY

- 
- 5 Have any of the charitable gifts you made felt especially meaningful?

- 6 Are there any volunteer experiences that have been particularly memorable or meaningful?


# **SECTION FIVE**

# **WISHES & INTENTIONS**



## SECTION FIVE

# WISHES & INTENTIONS

- 
- 1 Do you have cherished photos, recipes, or precious objects that you want to share or pass down? Are there any stories about them you want to share? Do you have any special wishes about how they are used?

- 2 Are there any specific ways you wish to be remembered?

## SECTION FIVE

# WISHES & INTENTIONS

3


What are your hopes and wishes for your loved ones?

4

Would you like to explain further any of the thoughts, feelings, or intentions behind the decisions in your legal will/trust?

## SECTION FIVE

# WISHES & INTENTIONS

- 
- 5 Do you have any instructions or requests regarding your funeral/memorial service or obituary?

- 6 Are there any other lessons, stories, or personal thoughts you wish to share?

# **SECTION SIX** **RESOURCES**





## SECTION SIX

# RESOURCES

### ESTATE PLANNING WORKBOOK

[www.jcpmemphis.org/foundation](http://www.jcpmemphis.org/foundation)

### BOOKS

*Ethical Wills & How to Prepare Them: A Guide to Sharing Your Values from Generation to Generation.* Riemer, Jack and Nathaniel Stampfer.

(2nd ed. Woodstock, VT: Jewish Lights Publishing, 2015)

*Ethical Wills: Putting Your Values on Paper.* Baines, Barry K.

(2nd ed. Cambridge, MA: Da Capo Lifelong Books, 2006)

*The Ethical Will Writing Guide Workbook.*

Baines, Barry K.  
(Minneapolis, MN: Josaba Ltd, 2001)

*Hebrew Ethical Wills.* Abrahams, Israel.

(Expanded facs. ed. Philadelphia, PA: Jewish Publication Society, 2006)

*Jewish Rites of Death: Stories of Beauty and Transformation.* Light, Richard A.

(Santa Fe, NM: Terra Nova Books, 2016)

*The Wealth of Your Life: A Step-by-Step Guide for Creating Your Ethical Will.* Turnbull, Susan.

(3rd ed. Wenham, MA: Benedict Press, 2012)

*Women's Lives, Women's Legacies: Creating Your Own Ethical Will.* Freed, Rachael. (2nd ed.

ed. Minneapolis, MN: Minerva Press, 2012)

*The Workshop Edition of So Grows the Tree - Creating an Ethical Will: The legacy of your beliefs and values, life lessons and hopes for the future.* Cebuhar, Jo Kline.

(West Des Moines, IA: Murphy Publishing, 2011)

### ARTICLES

"Ethical Wills: The Gift of a Heart." Alexander, Robert G.

(Journal of Practical Estate Planning, April-May 2006)

<https://legacycircle.cartercenter.org/documents/c/carter-center/downloads/ethical-wills-article.pdf>

"Giving Children Your Blessing: A Rabbi's Tips for Ethical Wills." Caplane, Ronnie.

(The Jewish News of Northern California, September 15, 2000)

<https://www.jweekly.com/2000/09/15/giving-children-your-blessing-a-rabbi-s-tips-for-ethical-wills/>

"Jewish Ethical Wills (Tzava'ot)." Rubin, Jamie. (My Jewish Learning)

<https://www.myjewishlearning.com/article/jewish-ethical-wills-tzavaot/>

"What to Include in an Ethical Will." Diener, Bob. (Aish, April 13, 2014)

<https://aish.com/what-to-include-in-an-ethical-will/>

"Writing an Ethical Will: How to Get Started." Rubin, Jamie. (My Jewish Learning)

<https://www.myjewishlearning.com/article/writing-an-ethical-will-how-to-get-started/>

"Writing and Reading Ethical Wills: On the Jewish custom of leaving a written spiritual legacy for one's children." Riemer, Rabbi Jack. (My Jewish Learning)

<https://www.myjewishlearning.com/article/writing-and-reading-ethical-wills/>

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## This image shows a single sheet of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.