

## “PUTTING YOUR VALUES ON PAPER: CREATING AN ETHICAL WILL”

Hand-out from the class

Jan. 31, 2024 with Pastor Tania Haber

LINK for the recording of the session:

<https://vimeo.com/westwoodlutheran> (scroll down to Jan. 31 recording – you’ll see Tania standing in the Westwood Rm; it’s titled “Ethical Wills: Putting Your Values on Paper”)

At this point in life, our “3<sup>rd</sup> Chapter”, many of us are asking “What’s next?”  
Articulating what’s truly important to us can help us answer that question!

Take a minute and write 3 reasons WHY you might want to do this....or what intrigued you enough to come?

### BIBLICAL

Going back 3,000 years, this is mentioned in the OT: Jacob gathers his 12 sons around his bedside before he died; before Moses died, he gives blessings (Deut 33); the Book of Proverbs was used to teach Jewish children; In John 15-17: Jesus gathers his disciples and gives his “Farewell Discourse.”

### WHAT TO DO WITH THIS?

- Share like a written letter when you choose; triggers great conversations, questions
- Attach to your legal docs.
- Put with your Funeral Plan at Westwood; the basis for a eulogy!
- You could take your template, then tailor a final paragraph to different family members

Podcast with good info: Remembering a Life.com “Ethical Wills: Putting Your Values on Paper” - Barry Baines, MD

Values exercise: Makes you select 5 in under 10 min! <https://www.think2perform.com/values/>

## THE PLAN

Dr. Baines suggests an outline to get started and frame things up. I'm giving you a bit of an outline with the categories that the questions fit into:

+ Values, Family, Your Faith & Spiritual Journey, Giving & Generosity, General/Other

If you have a different kind of outline as you think about it – go for it; there's no right or wrong!

## QUESTIONS FOR WRITING PROMPTS:

### OPENING

- You could begin with a sentence stating your reasons to your family/friends for writing this document and the date.

### VALUES

- After you've done the 'values selection exercise' <https://www.think2perform.com/values/> choose one and write about why that's important to you. Share a story or example of why that rises to the top of your list. (You could write on each of the values as well!)
- Honesty, sincerity, and authenticity are qualities that we all would lift up. Say 'why' this is important to you, to our communities, and to our world. Comment on where you've seen this, in whom, and share an example from your life.
- Humor. What strikes you as funny? (Tell your favorite joke or describe your humor.) Where do you find humor? Are there times when humor has helped heal or been important?...Or, people who have brought that into your life?
- Who do you respect, and why? Choose one person...or a couple.
- What kind of friends have you intentionally cultivated? What are some of your own 'rules' when it comes to how one treats one's friends?
- The 'work ethic' has shifted from a generation above ours to younger people now entering the workforce. It's not a matter of one generation having it 'right' and another 'wrong', but rather talk about what you learned from your parents and how you've lived, and then what are your realistic hopes for the next generations when it comes to work, family time, time for leisure, volunteering. This is about reflecting on balancing choices according to our values and our ability. Be honest about choices you've made that were tough and that you struggled with.
- When the dark valleys and the really tough times in life have hit, where have you turned? What things have given you strength, peace, and courage?

## FAMILY

- What do you value about your family (immediate or extended), and why? Tell a few stories and share a few examples of what you've seen and remember that you cherish. Perhaps some of what you value came out of your own family of origin where you were the child...share an example from that period.
- Choose one family member (or it could be a neighbor, friend, etc.) whose life you look at and are grateful for. Usually, a person we cherish or respect is not because of their accomplishments/successes, but because of who they were, how they treated others, how they lived out their faith...the lesser seen, but more important things. Tell what you respected and valued about them, and if anything from them played out in your life or you'd hope would get carried on.
- Speak about the joy you've found in your family. (Pick a person or a generation. And yes, this is your chance to say what you've most delighted about grandparenting, being an aunt/uncle, or sibling...)
- Name a tradition in your family that you value, enjoy, and hope to pass on to future generations. Why this one?
- Do you want to add any forgiveness or apologies? "I'm sorry for...." Maybe it's just a misunderstanding that would be helpful for you to write about.

## YOUR FAITH & SPIRITUAL JOURNEY

- Talk about your spiritual journey using a metaphor – a spiral, a roller coaster, valleys and mountains, a hike through mountains (both difficult and beautiful), a river, seasons, meals, a maze, etc. Share any words of grace that you've discovered about your own journey.
- As a person of faith, what words of spiritual guidance would you give to future generations? This may include you saying more about your own faith journey but focus more on this question and what you would say to the next generation or two.
- We talk a lot about our vocation at Westwood, i.e. the many ways God has created us to make a difference. Speak to one or more of your vocations. (We say our vocations are as family member, friend, our work (paid and volunteer), as a citizen and neighbor.) Include what some of greatest joys have been in that area, and also some of the greatest challenges. How has your faith played a role in that area, i.e., "How has God been in the mix?"
- Do you have a favorite Bible verse or hymn/song that you resonate with and love? Share that and tell why. (Example: From Micah 6:8 "What does the Lord require of you but to do justice, love kindness, and walk humbly with your God")
- The Prayer of Good Courage has become almost a Creed, a statement of belief, for us at Westwood. Perhaps you could include that prayer (or another prayer you love) and describe what it has meant to you.

## GIVING & GENEROSITY

- As people of faith, we seek to be generous with “ourselves, our time, and our possessions,” as our Offertory Prayer says. Dollars aside on this question, where have you been generous with your talents/skills/gifts over the years, and what has that meant to you? Where have you been generous with the gift of time in your life? Say what those places have meant to you.
- What have you learned about giving, serving, and sharing throughout your life? Where did you learn that, i.e. from whom or from what experiences?
- Share – Save – Spend. These 3 words have been used around Westwood for years as we’ve taught children and youth, but they are just 3 ways to think about and use the money and resources we have. Knowing that money can be one of those ‘hot’ topics that families don’t discuss, which one of those 3 was the ‘main message’ that you got from your family growing up, either by it being verbalized or acted upon? In your adult life, if you had to name one, which of those 3 has been most important to you and why? And then, knowing we always have to share AND save AND spend, how have you found a balance, i.e., do you have any practices, habits, or guidelines for yourself or your family that you follow or would like to suggest?
- In creating your will/estate plan, what guided you? Why did you make the choices you made about your money and your possessions? Is there anything you’d like to state or explain so that your family might better understand how you think and feel about these important matters? Go ahead and write down how you landed where you landed. What’s behind the dollars or percentages that are listed? Perhaps this document will help you clarify that or even update/edit some things. We should all revisit this every few years anyway, so take a look at yours after completing this document.
- What is one of the best things you’ve ever received? You could talk about actual gifts that were special to you as a child or adult...and/or you could share some of the qualities, experiences, and advice you’ve received in life that have helped shape you or touched your heart.

## GENERAL

- Do you consider yourself a lifelong learner? If so, why is that important to you? How have you continued to learn and grow as you’ve aged? Share examples of what you’ve done and why you’ve chosen those specific things to learn/do. Why would you hope that being a lifelong learner is a characteristic you’d want for your family/friends, i.e. why does it matter?
- What are some of your favorite books and why? Start reflecting on your childhood favorites, then some as a young adult or student, books that helped the way you think or something that sparked an interest in you as you were growing up, and then books as an adult that you’ve enjoyed, or that you

think are simply important to have read. Maybe keep the list shorter and put your energy into explaining 'why' that book.

- Did you have a special pet at any point in your life that was like a 'family member'? Tell about what that special animal meant to you.
- Think about a mistake you made, at any point in your life, and what you learned from it. Describe what the 'mistake' was, and then how it turned out and what you learned from it. How did you go forward differently because of this learning?
- What thoughts would you share when it comes to being a part of the larger world? (Think about a wider ring than your family and immediate communities, but rather nationally and globally.)
- What are your feelings about music, art, theater and their role in your life? Do you have a favorite style of music or art that you turn to, that you've collected or delighted in at any point in your life? Have you participated in any of that, i.e. played an instrument, painted or crafted, have tickets to the Guthrie or regularly go to live music?
- How does nature fit into your daily life, your choices for leisure, your spiritual life? Do you have wishes for this next generation as you think about the sustainability of our planet?

## CLOSING

- The Apostle Paul usually closed his letters in the New Testament with a brief wish or a blessing/benediction for those to whom he was writing. Take a few sentences to "sign off" in a way that concludes your thoughts above