



Writing Your Legal Will Doesn't Have to Be Hard. Start Here.

By Bill Marsella

When you think of writing your legal will, you probably think of meeting with an estate attorney to draft your last will and testament. These legal documents specify, among other things, your plans to leave the assets you've accumulated over your lifetime (e.g., monetary assets or real estate) to your loved ones.

Additionally, a legal will may also include your plans to make charitable gifts from the assets you've accumulated to specific charities or organizations in the community. In short, a legal will is about leaving your valuables to those persons or organizations you've cared about during your lifetime. But how do you make these decisions?

Notice that the word valuables begins with the word value. In order to be truly prepared to write your legal will, you must first know and recognize what exactly it is that you value or have valued during your lifetime. You need to be in touch with your values.

Here's how. Write a legacy letter, also referred to as an ethical will, to your loved ones. What's a legacy letter? The concept goes back several thousand years in the Bible to the prophet Jacob who, when he was on his deathbed, called his twelve sons to 'bless them and leave them his prophecies'. Thousands of years later, what was once an oral Judaic tradition has evolved to a written tradition in modern times.

A legacy letter or ethical will is nothing more than putting on paper what you want the next generation to remember about your life. Using the sacred stories of your life to leave to the people you care about your love, your life's lessons, your wisdom, and most of all, your values.

Before you sit down to write your legacy letter, reflect on the following three questions.

1. How is the world better because I've lived?
2. If I knew I was going to die tomorrow, what would I want to say to my loved ones?
3. How would I like to be remembered?

The answers to one or all of these questions will make writing your legal will far easier, particularly when it comes to deciding how and to whom you want to leave your valuables.

