



## ***Part I: Personal Legacies-The Meaningful Matters***

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1st May 2012



*For the past 12 years our work has been devoted to help preserve the legacy of dozens of esteemed families, through either the recording of their Legacy of Values~ Ethical Will, their Donor Legacy (for the Family Foundation) or their video biography. We have had wonderful opportunities to collaborate with some of North America's most inspiring families and their businesses to capture what really matters to them to pass on to next generations.*

*Through the articles we will submit for publication, we hope to inspire and enlighten your family to undertake preserving (non-financial) legacy for posterity. The series will begin with two articles describing the concept, history and process of preserving the values through an Ethical Will while sharing stories of some of the incredible individuals who have made it their personal mission.*

### **Part I**

Legacies are passed from one generation to another. We

are familiar with financial legacies that are generally passed on through a last will and testament. Spiritual legacies are more complex, coming from the heart and soul of an individual. Legacy work includes reflections of life experiences preserved through memoir writing or recording and story-telling; passing on wisdom and meaningful messages to loved ones.

An age-old method of preserving our spiritual legacy is in the form of an ethical will. Once produced, ethical wills can be considered heirlooms and are handed down as legacies to future generations. Unlike a financial will or a living will-written primarily for legal purposes-an ethical will is not a legal document. It can however, be a wonderful complement.

As an example, we all either have or know someone who cherishes a well-read handwritten letter from Grandma, scribed late in her life for her children, grandchildren and relatives espousing her wishes and hopes and perhaps including the family recipe for her famous spaghetti sauce.

An ethical will may include values, beliefs, morals, lessons learned, reflections on life, significant memories, acknowledgement of mentors, messages to loved ones, blessings, forgiveness and apologies, requests, dates to remember, and other meaningful thoughts. Ethical wills have been passed down orally in their original form, as well as various traditional written formats. More recently with advances in modern technology they can be recorded on high-definition digital video cameras and stored on archival DVDs that are designed to last for hundreds of years. Many other creative media and formats may be used to produce spiritual-ethical wills, such as scrapbooks, collages and quilts.

Typically, ethical wills are written by individuals at



turning points or milestones in their lives: facing challenges or transitional stages, such as the birth of a child or grandchild, remarriage, retirement, illness...there are many pivotal moments that might inspire us to record what really matters.

To look at the history and tradition of the ethical will concept and when it originated we go back to where it all began :

The earliest ethical wills are recorded in the Bible. For example, Genesis 49 describes Jacob just before he died, sitting outside his tent blessing his sons and telling them what had been important to him and what he wished for them. Deuteronomy 33 tells of Moses just before he died outside the Land of Israel; he offers his blessings to the people and what he wished for them "in the land of milk and honey" that they were about to settle. Fast forward to the Middle Ages: in the 1690's a German widow named Gluckel of Hameln, while running her late husband's business and raising her 12 children, sat nightly to write diary letters to them "so if God forbid something should happen to me-they should know our values and other important things". In more modern times, Martin Luther King's "I Have a Dream" speech; Randy Pausch's "Last Lecture", and even Oprah's last page in each of her magazine issues, "What I know for sure", as well as the way she runs her newest "Master Class" and "Life Class" television shows on the Oprah Winfrey Network at Harpo productions are all variations of ethical wills.

Originally done by men in early times, to perpetuate their patriarchal values and beliefs, the evolution of the ethical will for women has evolved over time to include recipes, blessings for children, and special insights that mothers and grandmothers often pass on to loved ones. It is well known in many cultures that women are likely keepers of family stories, tradition and heirlooms.

When leaving a legacy it is necessary to reflect on how we live our life, and the impact we leave on others. Legacy writing may include details reflecting relationships with significant others, philanthropic endeavors and community service we pursue. We are fortunate that

personal blogs, letters, oral interviews and video interviews can be preserved for hundreds of years with modern technology. All are priceless gifts we can leave behind to let loved ones understand the spirit with which we lived our life and some of the wisdom we gleaned along the way from our experiences, and the stories to exemplify both.

In our next article, the process and some testimonials from families who have recorded their legacies of values.

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