



MY ETHICAL WILL

Beliefs, values, and life lessons for future generations.

Think of all the personal lessons, tips, and knowledge you'd like to leave behind, whether it's information about your family history, things you've loved about life, or lessons you want to pass on to future generations. Technically, this is called an "Ethical Will" but think of it as the ultimate guide to who you are and what you believe.

Here are the six categories this document helps you get on paper:

- ✓ **Personal History:** What are the basics of you?
- ✓ **Favorite Things:** Travel, entertainment, and, of course, food.
- ✓ **Academic & Professional Life:** Lessons that can last a lifetime.
- ✓ **Most Meaningful Experiences:** Moments you cherished ...or didn't.
- ✓ **Religious & Political Views:** Express your beliefs and views.
- ✓ **Hopes For The Future:** Advice for the next generation.

ONCE YOU'RE DONE...

After you fill this out you can easily upload it into an Everplan and securely share it with the people you love and trust.

Send an email request to everplans@harvestadvisors.com and you will receive a personal invitation to create your Everplan.

YOUR PERSONAL HISTORY

These are easy for you but might even stump people who know you best (because they never asked).

- Where were you born? _____
- What traits did you inherit from your parents? _____

- What was your family like growing up? _____
- What pets did you have throughout your life? _____

- The first car you drove or owned: _____
- Military Veterans: What would you like to share about your service? _____

If Married

- How did you meet your spouse? _____

- How did the proposal go down? _____

- What were the most memorable moments from your wedding? _____

- Any family-friendly details to share about the honeymoon? _____

If Divorced

- Briefly explain why you got divorced (or go into detail if you feel compelled): _____

- What lessons did divorce teach you? _____



This stuff might seem obvious, but think about it this way: How many of these questions do you wish you could have asked someone who's no longer alive?

YOUR FAVORITE THINGS

You shouldn't have to think too long about the things you like most. Just express what inspired, entertained, enlightened, or made you happy. Feel free to add as many examples as you like.

- | | |
|--|---|
| <input type="checkbox"/> Place in the world: _____ | <input type="checkbox"/> Board Game: _____ |
| <input type="checkbox"/> Vacation Spot: _____ | <input type="checkbox"/> Sports Team: _____ |
| <input type="checkbox"/> Song or Album: _____ | <input type="checkbox"/> Athlete: _____ |
| <input type="checkbox"/> Musician: _____ | <input type="checkbox"/> Artist: _____ |
| <input type="checkbox"/> Book: _____ | <input type="checkbox"/> Hobby: _____ |
| <input type="checkbox"/> Writer: _____ | <input type="checkbox"/> Restaurant: _____ |
| <input type="checkbox"/> Movie: _____ | <input type="checkbox"/> Meal: _____ |
| <input type="checkbox"/> TV Show: _____ | <input type="checkbox"/> Dessert: _____ |
| <input type="checkbox"/> Actor/Actress: _____ | <input type="checkbox"/> Beverage: _____ |
| <input type="checkbox"/> Video Game: _____ | <input type="checkbox"/> Quote Or Saying: _____ |

YOUR ACADEMIC & PROFESSIONAL LIFE

An education or a career often define how we spend our lives.

Names Of The Schools You Attended And The Years:

- | | |
|---|---|
| <input type="checkbox"/> Elementary: _____ | <input type="checkbox"/> College: _____ |
| <input type="checkbox"/> Middle School: _____ | <input type="checkbox"/> Post Grad: _____ |
| <input type="checkbox"/> High School: _____ | <input type="checkbox"/> Other: _____ |

Major in college/area of study: _____

Extra-curricular activities (band, sports, drama): _____

Best lesson you learned in school: _____

Best teacher you ever had: _____

Thoughts about education/higher learning: _____

Best job you've ever had: _____

Worst job you've ever had: _____

Reason you chose your career/profession: _____

Best workplace advice you can offer: _____

If you had to do it over again, would you change anything? _____



Work is work. Raising kids, helping care for a person with special needs, keeping a home, fostering pets, donating time or services to charity, being on a town committee all qualify.

YOUR EXPERIENCES

The goal here is to let each answer flow naturally and trust the first thing that pops into your head.

- Fondest memories: _____
- Events that had the greatest impact on your life: _____

- What are you most proud of? _____
- What are you most grateful for? _____
- The happiest moment of your life: _____

- Favorite family holiday traditions: _____

- Best gift you received as a child: _____
- Person who influenced you the most: _____
- Your biggest regret: _____
- Hardest decision you ever made: _____
- Most difficult time in your life: _____
- When things got tough, where did you find comfort? _____

- How do you define happiness and success? _____
- Significant historical events you lived through and how you felt when they happened:

- Who would you like to ask forgiveness from? _____
- Who would you like to give forgiveness? _____



These questions may help remind you of all those innocuous moments in life that ended up having a lasting impact.

YOUR RELIGIOUS & POLITICAL BELIEFS & CAUSES

Discussing your beliefs should be an exciting prospect, especially if it's very important to you. This section can comfort those closest to you and educate people who may not have shared your views.

- Your most fundamental beliefs: _____

- Your thoughts on religion and faith: _____

- Your most valued traditions: _____
- Your political views can be characterized as: _____
- The reasons you have these political views: _____

- The charities and causes that have meant the most to you: _____



A tip about these questions: Only discuss *your* religious and political beliefs.

YOUR HOPES FOR THE FUTURE

If you had the chance to communicate what you want future generations to know, what would you say?

- Values I'd like to pass on: _____

- Wishes for my children: _____

- Wishes for my spouse/partner: _____

- A mistake I made that I hope you can avoid: _____

- An experience I hope you get to have: _____

- When you encounter hardship, remember this: _____
