

A Wealth of Resources

Professionals from many disciplines can help you create your ethical will.

By Barbara Spector

A new year is upon us, and Iris Wagner wants us all to make a resolution. "If everyone could sit down on Jan. 1 and reflect for one hour on the previous year," asserts Wagner, the founder, president and executive producer of Memoirs Productions—a Montreal company that produces ethical wills on DVD— "the world would be a better place."



She says she's been urging her friends in their 30s to begin writing an annual letter to their children on each child's birthday. When the children grow up, she says, "imagine the power of handing them 20-odd letters describing all your thoughts for each year—how you lived your life and what you've accomplished. They'll cherish it forever."

Relieving 'spiritual suffering'

Wagner, who started her company in 2001, first became aware of ethical wills when she was assigned to create her own as part of a leadership training program. "The process blew me away," she recalls. The exercise inspired her to combine her newfound enthusiasm for ethical wills with her background in filmmaking.

Today, Wagner is an associate of the Legacy Center, a virtual community of professionals offering ethical wills, personal memoirs, storytelling, consulting services, presentations and other related resources. Barry K. Baines, a physician who co-founded the Legacy Center, says his involvement with ethical wills began in the 1990s and emanated from his work as a hospice medical director.

"Our chaplain came in one day and told us about one of his patients whose spiritual suffering was off the charts," Baines recalls. "He was upset that he was going to die, and there was no evidence that he had ever been on this earth. The lightbulb went off in my head; I remembered having read about ethical wills."

After a staff discussion on the issue, Baines put together some resources on ethical wills and presented them to the patient—who, although he lacked substantial material wealth, was inspired by the idea of leaving his values to his loved ones. "As soon as he was done [creating the ethical will]," Baines says, "the spiritual suffering this man had had completely disappeared. We were all really moved by what happened."

Baines has written a book on the subject, *Ethical Wills: Putting Your Values on Paper*. "Over the past seven or eight years, we've been seeing a growth in public awareness" of ethical wills, he says. In particular, the financial planning community has "really latched onto the idea" of ethical wills as an aid for clients developing a personal estate plan, he notes. Baines, who is based in Minneapolis, says he spends about 20% of his time on ethical wills, in addition to his hospice work and his job as chief medical officer of a health plan. "I always make time for ethical wills, no matter what," he says.

A video legacy

Wagner of Memoirs Productions calls her video ethical will service the "Legacy of Values Edition." She says she avoids the term "ethical will" because many people unfamiliar with the concept "think it's a death statement," she says.

In fact, Wagner says, she advises clients to show the video to their families while they are still alive, and most have done so; she says they report that a communal viewing brings family members closer together because it encourages them to share memories. One CEO client recorded an ethical will to commemorate her 60th birthday and presented it "as a gift to her children" in lieu of a lavish family celebration, Wagner says. "Post-9/11, people have begun to realize there's much more to leave [to heirs] than just jewelry and investments."

Memoirs' "Legacy of Values" service begins with an off-camera interview that explores clients' core values, beliefs, reflections on life, hopes for the future and messages for future generations, Wagner explains. This consultation generates a worksheet that becomes the blueprint for the unscripted filming. Ethical wills generally involve three to four hours of filming, edited down to 30 to 40 minutes, she says.

Women's ethical wills tend to differ from men's, Wagner observes. "Women are nurturers," she says. "They want to talk about their feelings toward their children, and they want to pass along family recipes." One female client recorded blessings for her children, Wagner notes. Men's ethical wills, by contrast, "are more commanding," though her worksheet helps coach male clients to be more reflective, she says.

Memoirs also offers an "Heirloom Edition," which features a video biography with narration, music, images of family heirlooms and other effects. This service involves 14 to 24 hours of interviews, edited down to a 60- to 90-minute biography. The "Heirloom Edition" includes an ethical will, packaged on a separate DVD.

A third service, the "Corporate Archival Edition," presents a company's history, values and goals. Memoirs gives its clients the worksheets and unedited footage along with the edited videos.

Costs start at \$5,000 for the "Legacy of Values" edition and vary according to location and number of days involved in shooting and editing. For more information, see www.memoirs.ca.

For information on the Legacy Center, see www.thelegacycenter.net. Baines also has created a website devoted to ethical wills, www.ethicalwill.com, which offers resources and examples.