



Your Ethical Will



If you have not already listed your important documents and put your financial affairs in order, now is the best time to start. Once completed, keep your personal records in a spot that's safe and easily accessible.

In the event something happened to you, are you prepared? Having a Personal Records Organizer can make it easier for your family to locate documents, contacts and information that is imperative during a time when they may need it most.

Your records should be reviewed on a regular basis. If revisions are needed, Haunn Landers & Co will be happy to provide a new copy of this booklet for you to enter your updated information.

NAME: _____

DATE FIRST PREPARED: _____

DATE(S) REVISIONS MADE: _____

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Haunn Landers & Co.
Experience. Trusted advisors to accomplished entrepreneurs.

My Ethical Will

Your legacy is about much more than the monetary value of your estate; it is also about imparting wisdom and expressing your values.

Who would you like to share this section with?

Reflections

What is really important to you?

Describe some of the happiest moments of your life.

What is your fondest memory of your childhood?

How I met my spouse/partner.



What one person has made the biggest difference in your life?

What was the most difficult decision you ever had to make?

Describe an event that changed your life.

What have you done in life to stand up for your values?

Which of your achievements makes you the most proud?



Wisdom

What lessons have you learned from life?

What have you learned about enjoying life?

What have you learned about managing money?

What have you learned about facing unexpected challenges?

What does spirituality mean to you?

What are some things you have learned about love and relationships?

What parenting tips would you like your children to consider?

Hopes

What do you want for your spouse/partner?

What do you want for your children?

How would you like your children to remember you?



Closing Thoughts

Ethical wills can bring closure to your loved ones by providing them with words of gratitude, forgiveness, acceptance and repentance. You may wish to write your thoughts in the form of a letter to your spouse/partner, your children or your wider family and store your messages with this document. Alternatively, share any parting words below.

