

Book Review

Words from the Heart: A Practical Guide to Writing an Ethical Will

Miranda Reiter

Weiner, E.L. (2015). *Words from the heart: A practical guide to writing an ethical will*. ISBN-13: 978-1450702690.

Financial advisors and counselors who value holistic financial planning help their clients invest and manage their assets, as well as assist them in other relevant areas such as estate and legacy planning. With the collaboration of an attorney, financial professionals help clients obtain important documents, such as wills and trusts. A lesser known legacy planning tool is an ethical will.

An ethical will is document, which has been used traditionally to pass on values, stories, and wisdom from one generation to the next. They have served as both an oral and a written form of legacy planning since Biblical times. An ethical will is not a substitution for a traditional will and testament, but rather a compliment to it. While a traditional will is a legally binding document and has strict rules about how it is structured and what it includes, an ethical will has none of these requirements. It is common for an attorney to write a traditional will but anyone can write an ethical will for him or herself. Ethical wills are the warm and fuzzy side of will writing. They are personal and allow us to leave memories and share our life stories, rules for living, and other sentiments with others. The author of *Words from the Heart* states, “the ethical will is a tool that has the potential for clarifying communication and avoiding family conflict” (Weiner, 2015, p. 2).

Written in a short workbook style, the primary goal of *Words from the Heart* is to offer a starting place for those seeking to write an ethical will. He also seeks to help “people openly discuss and stay inter-generationally connected around issues of legacy” (Weiner, 2015, p. 2). Ethical wills are traditionally written from an elder family member to a younger one, but Weiner asserts that an ethical will can be written by anyone, to anyone: a mother to her unborn child, a sister to a brother, a grandfather to his great-grandchildren, or even “an attorney to humanity”. He also makes it clear that ethical wills need not be written solely for sad occasions, such as deaths, memorials, and funerals. He encourages readers to write ethical wills in one’s prime and share them with the intended audience while still living.

Weiner's philosophy on writing ethical wills is to embrace honesty and openness; in other words - write from one's heart. He created the acronym H.E.A.R.T., which is his foundation for how an ethical will should be written. "H" stands for hopes for the future. "E" stands for experiences in life. "A" stands for appreciation. "R" stands for religion, spirituality, and core beliefs. "T" stands for treasures.

The author defines each of these themes separately throughout the book, explaining them through his personal and professional experiences and stories. For example, in the "Hopes" section, which is neatly marked with a page divider bearing the letter "H", Weiner describes what "hope for the future" means for an ethical will. He breaks it down into two important principles: (a) the personal character one needs to deal with life and (b) practical suggestions and instructions. Weaved throughout the section are inspiring quotes and thought-provoking statements which encourage the reader to explore his or her thoughts related to hope.

After setting the stage for how the reader can envision hope in his or her own life, Weiner further prompts creativity and action in the writing process by offering "challenge" questions. These questions help the reader to reflect deeply on their values and what is important to them. Some of the questions for addressing hope are "What are some of your most important aspirations?"; "What advice do you have for keeping hope alive?"; "How have you learned to deal with failure?". Adjacent to the questions is plenty of space for writing.

Weiner provides further writing inspiration as he shares real-life excerpts from ethical wills others have used. This sequence of detailing the given theme, posing challenge questions, referencing uplifting quotes, and providing writing samples is followed for each of the five themes in its own section until the end of the book. Weiner wraps up *Words from the Heart* by giving a few final tips on writing an ethical will and then shares his own personal ethical will.

Weiner's *Words from the Heart* is, by all means, a timeless and practical book in which the reader will feel comfortable writing his or her deepest thoughts. Weiner facilitates this process, as his tone is encouraging and positive throughout. Weiner encourages ethical will writers to write uplifting passages and to avoid writing "grudges from the grave". As a licensed marriage and family therapist, it is apparent throughout the book that Weiner has seen families and individuals through both triumphs and tribulations. His experience in this area will help readers to feel reassured. His gentle nudging and structured process will guide them through as they make a written contribution to themselves, family, friends, and other cherished circles. Writing an ethical will is not an easy undertaking, but *Words from the Heart* does a lot to facilitate the task. Reading this book and engaging in the exercises is therapeutic and enlightening.

This book is easy to understand and, therefore, would be valuable to therapists, counselors, advisors, academics, families, and individuals alike. The author's audience is the will writer him or herself, but it can be used as a tool for facilitating a course or workshop on ethical will writing, a gift to clients, a starting place for legacy planning discussions, or a

resource in a therapy session to prompt discovery and self-reflection. This book offers no fluff. It is short and quickly gets to the point of its main objective: helping the reader write. Readers who have no experience with ethical wills, as well as those who would like to update or refresh their ethical wills, may find this book to be of particular help and importance. *Words from the Heart* is a refreshing and valuable contribution to the field of legacy planning. If you're looking for a place to start and to take action on writing an ethical will, let it be your guide.