

DO YOUR LOVED ONES KNOW THE “WHY” BEHIND YOUR WILL?

A GUIDE TO PASSING DOWN BIBLICAL WISDOM AND CHRIST-CENTERED VALUES THROUGH YOUR WILL

Your will and trust documents direct your estate—but they can also share the vision behind your decisions as a follower of Jesus Christ, “*in whom are hidden all the treasures of wisdom and knowledge*” (Colossians 2:3, ESV). Discover how a personal message accompanying your will can reflect your heart for Him by using this worksheet as a guide. No matter where you are in the process, this resource is designed to help you point your loved ones to the Lord as you make your estate plans.



THE “WHY” BEHIND YOUR WILL: SHARING VALUES AND BELIEFS

As you create or update your will, one of the most important things you can do is share the motivation behind your bequest decisions. The stories, traditions, life lessons, and Biblical wisdom you’ve drawn from your experience as a follower of Jesus Christ have likely shaped the choices you’ve made as you prepared these documents.

Unfortunately, your will alone can’t convey the thought behind bequest decisions—but a personal letter or video message can. Attorneys will encourage you to keep your property descriptions appropriately brief, but this doesn’t mean you can’t add an introduction or explanatory letter.

Below are questions to consider as you create this message. Not all of these questions may apply to you, but they can help you think through what you’d like to share. Whichever you answer, the questions below are designed to help you effectively share how your faith in Jesus Christ has shaped your life and your will and trust decisions. Once you’re finished, you can include it with your formal estate planning documents. Remember this isn’t legally binding, but it should be consistent with all of your bequest decisions.



PERSONAL HISTORY

- Where did you grow up? Were there any special circumstances—including tragedies or setbacks—during your childhood that impacted you?
- Think about any special stories or fun facts about your parents and siblings. What did you learn from these family members? What do you remember most about them?
- Who were your best childhood friends, and what did they teach you about relationships, loyalty, and trust?
- When did you surrender to Jesus Christ in repentance and faith and accept His salvation?
- What are your fondest memories of family vacations?
- Were there any teachers—at school or at church—or college professors who impacted you?
- How, when, and where did you meet your spouse? What aspects of his or her character attracted you?
- What lessons have you learned in your relationships with family members that you’d like to share?



FAMILY TRADITIONS

- What traditions are important to you? Do you hope that your family will continue these? Why?
- Share significant family traditions associated with birthdays, holidays, and seasons. How would you like these to be carried on?



CAREER AND FINANCES

- What shaped your career decisions? What motivated you to pursue your chosen field of work?
- What are some of the lessons you learned over the years regarding budgeting, borrowing, giving, saving, investing, and record-keeping?



SPIRITUAL HERITAGE

- What special abilities or attributes do you see in your children and grandchildren? How do you think they can use these to serve the Lord? Share your ideas with them.
- Has God given you any specific hopes or dreams for your children and grandchildren?
- What are your favorite hymns and songs? Share their significance to you. Share these with them.
- What is your favorite Bible verse and why?
- What is the bravest or boldest thing you have ever done? The funniest? How did God use these events in your life?
- Would you do anything differently, and if so, what? How did you seek forgiveness in the midst of conflict? How did you make changes?
- Describe the churches you have belonged to and the ministries in which you've served. What are your spiritual gifts and how have you used them to minister to the body of Christ?
- Share major, life-changing events. How did you respond? How have you seen the Lord work through the storms and successes in your life?



GENEROUS LIVING AND GIVING

- What have you learned from a life of giving? Which ministries do you support—now and in your will—and why?
- What encouragement or advice can you offer about charitable giving?

Once you have chosen which questions to answer, develop an outline. As you create your letter or video, think about your loved ones who will be reading or listening to it. Be warm and engaging—and keep in mind that this will affect how your family remembers you. Keep a positive tone and let Christ shine through your words.

“I know, my God, that you test the heart and have pleasure in uprightness. In the uprightness of my heart I have freely offered all these things.”

—1 CHRONICLES 29:17, ESV

