



Life Reflections Project

Writing a Legacy Letter: A Guide for Facilitators

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This brief guide is designed for hospice professionals and other health care providers who serve patients or clients approaching the end of their lives. Our goal is to help you assist a patient or client who expresses interest in writing a “legacy letter.”

What is a Legacy Letter?

A legacy letter (also called an “ethical will”) is a brief written statement that allows people to share their life lessons, express their values and transmit their blessings to future generations. Writing a legacy letter is a rewarding experience that creates an enduring gift for family and friends. People who are approaching end of life may find the process especially meaningful.

To write a legacy letter, someone must be willing and able to access their memories, reflect on their life experiences, and express wishes and blessings for people they care about. Some people receiving palliative or hospice care may be able to write their own legacy letter and share it with family or friends; in those cases, we hope you will offer your advice and encouragement. This guide is designed to help you support patients who need more active assistance and facilitation.

Pre-Assessment

If your patient expresses interest in life review, meaning making or spiritual self-reflection during your interactions, you may conclude that they could benefit from the legacy writing process. To confirm their readiness, we encourage you to begin with an initial assessment. Please exercise your professional judgment as you consider these two questions:

First, is your patient able to reflect on their life experience in a positive and productive way? Or would it be too challenging or painful for them to summon up those memories? A legacy letter should be a gift to the person who writes it *and* the people who receive it. If this process feels like it would not be helpful or rewarding, then it may not be appropriate for your patient.

Second, does your patient have cognitive or physical impairments that make it difficult to recall details from their life, or make it difficult to share their memories verbally? People with significant memory loss or speech impairments can still craft a moving and meaningful legacy letter, but you may need to adjust your questions and expectations accordingly. We have included some questions in this guide that are designed for people in those situations.

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We encourage you to start by explaining what a legacy letter is and what it is designed to do. If your patient expresses interest in this process, ask them who they would like to address their legacy letter to—that may include family members, friends or other recipients. Even if the patient has no specific recipients in mind, they may still appreciate this process of self-reflection and may choose to keep the letter just for themselves. If you decide to wait until your next visit to conduct the legacy interview, you should encourage your patient to begin reflecting on significant memories, sources of meaning, and relationships in their life.

Interview, Drafting and Presentation

You should then conduct one or more legacy interviews with your patient. The time you spend will depend on your patient's enthusiasm and capacity, but we recommend at least an hour of conversation, if possible. You may want to record the conversation. If you do record it, be sure to first secure the patient's permission and a signed authorization form. At the end of this document, we've included a link to a sample authorization form.

Once the interview process is complete, your goal is to craft a brief written document that captures a few of the most powerful stories, values and blessings expressed by your patient. There is no right length for a legacy letter—it may be several paragraphs or several pages. While a legacy letter is not a verbatim transcript of your interview, it is important to capture your patient's voice by including some of the words and phrases they use. You can format the letter yourself or use the template we've created; there is a link at the end of this document.

Next, share the draft with the patient to be certain that it is accurate and that it conveys the feelings or wishes they want to express. Finally, talk with them about how and when they would like to share the letter and then make arrangements to honor their wishes. That may involve sending the letter to specific recipients, gathering recipients to hear a reading of the letter, or simply presenting the letter to the patient. Whatever the case, this is a chance to conclude the process with a meaningful ritual.

Interviewer's Template

The following questions are designed to guide you through a legacy interview. We've divided the questions into six categories—but please keep in mind that every legacy interview is different, so don't feel compelled to ask all these questions or to ask them in this order. Pay special attention to moments or questions that prompt a heartfelt response from your patient; those topics are worth exploring in more depth. Also keep in mind that legacy interviews can sometimes surface powerful or raw emotions. Using your professional judgment, you may want to offer clinical interventions such as reflective listening, validation, and shared spiritual reflection as part of this process.

1. Introduction

- **Who are you writing this letter to?** (This could be an individual, a group of people or a category of people, e.g., my family, my grandchildren, my friends, the people I love, my community.)
- **Is the letter private? Or can the recipient(s) you named share your letter with others?**
- **Why do you want to write this letter? What are you hoping to accomplish?**

Some possible responses you can suggest:

“Because I want to express how much my family means to me”

“Because I want to share some important lessons I’ve learned in my life”

“Because there are some things I haven’t had a chance to say”

“Because I want to offer my blessings to people I love”

2. Telling Your Story

Rather than inviting the patient to tell their entire life story, you should use these prompts to help them focus on a few defining moments or important choices in their life. If they struggle to respond to these questions or to recall details, you might inquire about specific memories or relationships that you are already aware of.

- **What are a few of your happiest memories?**
 - **What were a few of the hardest moments in your life? What did you learn from those experiences?**
 - **What is one important decision or choice you made that affected the rest of your life?**
 - **What is one thing that defines you as a person?**
 - **What lessons have you learned in your life that could help other people?**
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Some patients who struggle with memory may still be able to respond to questions about their life and their values. Use your professional judgment to assess the level of detail that your patient is able to recall or relate. Here are some questions you might ask a patient with mild memory impairment:

- **What is one thing you remember from your childhood?**
 - **What is your favorite story to tell about yourself?**
 - **What is the best thing that ever happened to you? Or the worst?**
 - **What are your wishes for the people you love?**
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3. Values

Writing a legacy letter allows your patient to name some of the fundamental values that they really believe in. Your goal is to help them connect those values with the stories they relate from their life: how do their stories reflect the values and principles that mean the most to them?

- **What are your most important values?** (You might suggest some examples, such as family, faith, generosity, integrity or perseverance. Or you might prompt the patient by asking, “What does _____ mean to you?”)
- **Where do your values come from? How and when did you learn them?**
- **What achievements or moments in your life are you most proud of?**
- **What values have you struggled to live up to? Why has it been hard to honor those values?**
- **What advice can you offer to help other people live a good life?**

4. Gratitude

A legacy letter is an opportunity for your patient to “count their blessings”—and to recognize and thank the people who have enriched their life.

- **As you look back on your own life, what are you most grateful for?**
- **Who are you grateful to?**
- **How have other people enriched your life or contributed to your happiness?**

5. Reconciliation

This is the most challenging element of the legacy writing process—but for some patients, it also can be the most rewarding. Again, use your professional judgment to assess whether these questions and the responses they invite would be too painful for your patient or the recipients of the letter. While a legacy letter offers your patient an opportunity to be generous or to heal an old wound, you may advise them to seek reconciliation privately and directly with the people they name, rather than expressing their thoughts in this format.

- **Is there anyone in your life who you want to forgive? (It could be someone living or someone no longer alive.) What do you want to say to them?**
- **Are there any disappointments in your life that you need to accept or make peace with?**
- **What are your regrets? Are there things that you said or did that you wish you hadn't? Or things you *didn't* say or *didn't* do that you wish you had?**
- **From whom do you need to ask forgiveness? What do you want to say to them?**
- **If you had your life to live over again, what would you do differently?**

6. Blessings

In a legacy letter, your patient can tell their family and friends, including future generations, what they wish for them. It's also an opportunity for your patient to help shape their own legacy and to consider how they want to be remembered.

- **How would you like to be remembered? What would you like to be remembered for?**
- **What blessings would you like to offer the people who you have invited to read this letter?**
- **What blessings would you like to offer to future generations who might read your letter someday, many years from now?**
- **What are your hopes for the world's future?**
- **How would you like to close your letter?**

You may suggest something like this:

*“With love,
Your mother and grandmother”*

or

*“With all my heart,
Ruth”*

7. Final Steps and Additional Resources

At the end of the interview, let your patient know how soon they should expect you to produce a draft of the letter. We recommend returning with a draft within a week to two, if possible.

After you conduct the interview, draft the letter and secure your patient's approval, you should complete these final steps:

- Reconfirm: Who should the letter be shared with?
- Reconfirm: Who else has permission to read the letter?
- Reconfirm: Has your patient signed an authorization form?
- Develop a plan with your patient for when and how they want to share the letter with others.
- Thank your patient for their time and their willingness to engage in this process.

Resources:

You can download this Facilitators Guide and other resources from the Life Reflections Project website. We are happy to offer these documents at no cost but they are copyrighted. If you use them, please acknowledge that they are produced by the Life Reflections Project.

The following documents are available at www.jaysherwin.com/legacy-writing-facilitators:

- Facilitators Guide
- Authorization Form (1 page version)
- Authorization Form (2 page version)
- Sample Legacy Letter 1
- Sample Legacy Letter 2

We hope you find the experience of helping someone write a legacy letter deeply meaningful and rewarding, just as we have in our own work.

We would love to hear from you:

- How well did the process work?
- What changes or modifications did you make?
- How can we improve this guide?

If you have further questions or want to share comments, please contact us.

Thanks and blessings to you,

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