Kathleen M. Rehl, Ph.D., CFP®, CeFT®

Speaker • Author • Mentor • Researcher

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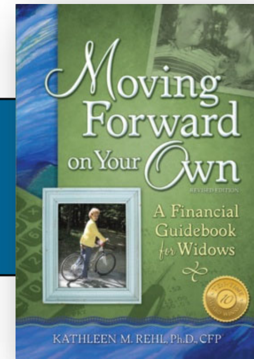

My Story from the Heart

When my late husband died it felt like a big part of me died, too. I lost the love of my life and the dreams we shared. But that bitter unhappiness was the beginning of my new life ahead. After his passing, I wanted to empower widows financially™ and inspire their advisors.

It began with writing a guidebook for widows. Today it continues through my speaking, writing, mentoring and doing research about widows and money.

> *"Congratulations on your very powerful presentation at the Women Advisors Forum. I was so impressed at your ability to put into words the inexpressible emotions of a new widow. You are doing incredible work in helping advisors understand how they can best help women who have lost their partners."*
>
> Eleanor Blayney, CFP®, President - Directions, LLC

Sharing Insightful Expertise and Experience

Dr. Kathleen Rehl is an authority on widows and their financial issues. Having experienced widowhood herself, she's passionate about inspiring other widows and their advisors. Kathleen is the author of the multi-award-winning book, *Moving Forward on Your Own: A Financial Guidebook for Widows*. She's frequently invited to speak at industry meetings and conferences, in addition to events sponsored by advisors, foundations and other non-profit groups.

Kathleen's work has been featured in the *Wall Street Journal, New York Times, Kiplinger's, Money, U.S. News & World Report, CNBC, Reuters, USA Today, AARP Bulletin* and many more. The U.S. Army uses her guidebook in their Survivor Outreach Services centers worldwide.

After 17 years of providing personal financial advice, she now speaks, writes, mentors and does research through her firm, Rehl WEALTH Collaborations LLC. Kathleen is on the faculty of Sudden Money Institute.

Kathleen has walked the walk about which she speaks and writes . . . focusing on women who have loved and lost—inspiring them to move forward on their own . . . yet not alone. Her core values shape practical ideas and tools that assist professionals to understand and serve widowed clients well.

Amazon Review

"This book should be standard on the shelves of Estate Attorney's, Elder Care Attorney's, Financial Planners and anyone who works and serves women. Congratulations, Kathleen, on a wonderful book!!!"

Michael F. Kay, CPA, CFP®
President, Financial Focus, LLC
Livingston, NJ

Rehl WEALTH COLLABORATIONS

Continued . . .

Kathleen M. Rehl, Ph.D., CFP®, CeFT®

Education and Credentials

- Certified Financial Transitionist®, Sudden Money Institute, January 2015
- Certified Financial Planner™ Board of Standards license #055348, September 1995
- Ph.D., Education - University of Illinois at Urbana-Champaign, October 1976

Publications

- Many professional and popular publications; go to http://kathleenrehl.com/news.html for more than 100 articles and blogs
- *LEGACY LIFEPRINT™: Sharing Your Story, Values, Wealth, and Aspirations for Future Generations* (eBooklet), 2015
- *Delight Your Clients and Prospects: Host an Enlightening, Engaging Event* (eBooklet), 2015
- *Impactful Empathy: What to Say and How to Say it to Your Grieving Widowed Client* (eBooklet), 2014
- Financial Steps for Recent Widows (eBooklet), 2014
- How to Attract, Connect and Engage Widowed Clients (eBooklet), 2014
- *Working with Widows: Understanding Grief and Emotions of Women in Transition*, Protective Life, 2013
- *Moving Forward on Your Own: A Financial Guidebook for Widows*, Rehl Financial Advisors, 2010
- *Planning for the Times of Your Life: 45 Great Financial Planning Ideas,* Cambridge Advisors, LLC, 1999

Speaking Events—Partial Listing of ~300 Presentations

- Raymond James FID Management Symposium—Sarasota, FL, January 2019
- Voya Advisor Insight—Lake Buena Vista, FL, January 2019
- Michael Kitces Podcast—#FASuccess Episode 106
- ProEquities—Winter Park, FL, November 2018
- Advisor Group – ConnectED—Anaheim, November 2018
- SMI / FTI Annual Conference—West Palm Beach, November 2018
- Janney Home Office—Philadelphia, October 2018
- Allstate—Dallas, September 2018
- FSP Central Iowa Chapter—Des Moines, IA, September 2018
- LPL Conference—Boston, July 2018
- Raymond James Summer conference—Orlando, July 2018
- 2018 Million Dollar Round Table Annual Meeting—Los Angeles, June 2018
- Janney Wealth Management—Baltimore, June 2018
- Securities America conference—New Orleans, June 2018
- Raymond James Financial Services—Washington, DC, May 2018
- Advisor Group W Forum—New Orleans, February 2018
- 2018 FSP Arizona Institute—Litchfield Park, AZ, January 2018
- Sudden Money Institute Annual Conference—Palm Beach, FL, November 2017
- Advisor Group ConnectEd—Orlando, FL, October 2017
- ProEquities—Birmingham, AL, August 2017
- MWC "Widows Empowerment Weekend"—Orlando, FL, August 2017
- LPL Forum—Boston, MA, August 2017
- Cetera Advisor Networks—Washington, D.C., July 2017
- CUSO—San Diego, July 2017
- Securities America Connected—San Diego, CA, June 2017
- Cetera—Washington, D.C., May and June 2017
- Edward Jones—Birmingham, AL, May 2017
- NAPFA—Bellevue, WA, May 2017
- Purposeful Planning Institute—teleconference, March 2017
- Plan Stronger TV—PBS Daytona State College, March 2017
- Our Savior Lutheran—Mesa, AZ, March 2017
- Financial Transitionist Institute—Palm Garden, FL, November 2016
- Protective Life—Austin, TX, November 2016
- Society of Military Widows—teleconference, October 2016
- ProEquities—Charlotte, NC, October 2016
- Women's Money Empowerment Network—podcast—September 2016
- First Protective—New Orleans, LA, August 2016
- Purposeful Planning Institute—Denver, CO, July 2016
- Chautauqua Professional Women's Network—Chautauqua, NY, July 2016
- Financial Experts Network—webinar, June 2016
- Investment Advisors Corporation—webinar series, July 2016
- 2016 NAPFA Spring Conference—Phoenix, AZ, May 2016
- Sweet Financial Services—Fairmont, MN, April 2016
- Protective Life—Dayton, OH, March 2016
- Edward Jones—Newton, NC, March 2016
- Society of Financial Service Professionals—audio conference, February 2016
- Protective Life—Indianapolis, IN, January 2016
- Purposeful Planning Institute—teleconference, January 2016
- Edward Jones—San Diego, CA, January 2016
- SunTrust—webinar, December 2015
- Sudden Money Institute—Palm Beach Gardens, FL, November 2015
- Navigation Retirement Group—Oro Valley, AZ, October 2016
- Edward Jones—Birmingham, AL, September 2015
- Protective Life—webinar series, September 2015
- Purposeful Planning Institute Rendezvous—Denver, CO, August 2015
- Chautauqua Professional Women's Network—Chautauqua, NY, July 2015
- Protective Life—Tempe, AZ, July 2015
- Monroe Township Senior Services—Monroe Township, NJ, July 2015
- Raymond James Financial—Orlando, FL, July 2015
- W. Tedd Oyler, JD, CFP—Holland, MI, June 2015
- Ladenburg Thalmann Institute of Women and Finance—webinar, May 2015
- Cetera Financial Group—Nashville, TN, April 2015
- Army Survivor Outreach Services teleconf.—Ft. Leonard Wood, MO, April 2015
- Society of Financial Services Professionals—Dallas, TX, April 2015
- Purposeful Planning Institute Fusion—Orlando, FL, March 2015
- Tennant Financial NWM Wealth Management—Longboat Key, FL, March 2015
- Advisor Group Women's Conference—San Diego, CA, March 2015
- Cherrington Brotsky Conscious Capital—Hilton Head, NC, February 2015
- US Bancorp Investments, Inc. webinar—February 2015
- Low Load Insurance Services University—Tampa, FL, February 2015
- Raymond James Financial—Las Vegas, NV, January 2015
- Forum 400—Phoenix, AZ, January 2015
- Sudden Money Institute—Palm Beach Gardens, FL, December 2014
- Griggers, Pierce, Souma & Tatman—Macon, GA, October 2014
- Cetera Regional Convention—Bethlehem, PA, October 2014
- Edward Jones—Birmingham, AL, October 2014
- SunTrust Bank Estate Planning—Atlanta, GA, October 2014
- Finn & Rodriguez Wealth Management—Newport, RI, October 2014
- Aging in Place Conference—Hendersonville, NC, September 2014
- Edward Jones—Birmingham, AL, September 2014
- Chicago Police Memorial Foundation—Chicago, IL, September 2014
- ConnectED 2014—Nashville, TN, September 2014
- SunTrust Bank—Boca Raton, FL, September 2014
- Society of Financial Service Professionals—Orlando, FL, August 2014
- LPL Financial Focus 2014—San Diego, CA, August 2014
- Chautauqua Professional Women's Network—Chautauqua, NY, July 2014
- Women of the ELCA Triennial Gathering—Charlotte, NC, July 2014
- Investment News— webinar, July 2014
- Edward Jones—San Antonio, TX, June 2014
- Protective Life—Chicago, IL, June 2014
- The Advisor Group Women's Conference—Miami, FL, June 2014
- Fisher Investments—Camas, WA, May 2014
- Sudden Money Institute—Miami, FL, May 2014
- The Enrichment Group—Miami, FL, April 2014
- Bedel Financial Consulting—Indianapolis, IN, April 2014
- Edward Jones—Birmingham, AL, April 2014
- Luther College—Decorah, IA, April 2014
- NFP Conference—Orlando, March 2014
- Camp Widow National Conference—Tampa, FL, March 2014
- Community Foundation of Western North Carolina—Ashville, NC, February 2014
- Sudden Money Institute—Palm Beach Gardens, FL, February 2014
- Many more in 2013 and before

In the News—Partial Listing

- *AARP Bulletin*
- *CP Financial Focus*
- *Advisor One*
- *Advisor Perspective*
- *Blueleaf*
- *Bottom Line Personal*
- *Broker World*
- *CBS & Fox News*
- *Chautauquan Daily*
- *Citizen-Times.com*
- *CNBC*
- *Financial Advisor IQ*
- *Financial Planning Magazine*
- *FINRA*
- *Florida Today*
- *Gather*
- *Inside Information*
- *Investment Advisor*
- *Investment News*
- *Journal of Financial Service Professionals*
- *Kiplinger's Retirement Report*
- *Lake Oswego Review*
- *Miami Herald*
- *MoneyNews.com*
- *Mountain Express*
- *NAPFA Advisor Magazine*
- *Next Avenue*
- *New York Times*
- *OnWallStreet.com*
- *Reader's digest*
- *Research Magazine*
- *Reuters*
- *Sixty & Me*
- *Tampa Bay Times*
- *US News & World Report*
- *US Army SOS Newsletter*
- *USA Today*
- *Vanguard Group*
- *Wall Street Journal*

Professional History

- 2014 to current—Empowering Widows Financially™ at Rehl WEALTH Collaborations LLC
- 1996-2013—Owner of Rehl Financial Advisors—Certified Financial Planner™
- 1976-1995—Tenured Assistant Professor at Hood College, Frederick, MD after similar position at the University of Nebraska-Lincoln; VP at Lutheran Social Services of Central Ohio in Columbus; Director of Gift Planning at the National Foundation for Chiropractic Education and Research in Arlington, VA