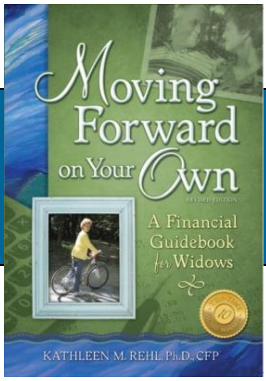

Kathleen M. Rehl, Ph.D., CFP®, CeFT® Emeritus

Author ● Educator ● Mentor ● Storyteller

Empowering Widows Financially · Inspiring Legacy and Longevity Planning

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Resumé
Story of Origin from My Heart

Once upon a time, a baby girl was born in a faraway land called Wisconsin during a blustery blizzard.
Her parents named their child Kathleen. That was me, and this is my story.

Childhood on family farms, constant chores
Caring for animals, crops, and catastrophes
Squabbling parents, money was short
Receiving valedictorian scholarship
Being the family's first college grad.
"Was that your escape?"

Public schools teaching
Wiggly first-graders and sassy teens
Studying for Ph.D. same time
Defending my thesis
Opening new doors with that golden key.
"Thought you loved being a schoolteacher?"

Hello, university faculty status
Diving into academic teaching
Fast-tracking tenue
Changing abruptly, pivoting
Leaving ivory-tower colleagues.
"How could you go?"

New challenges at nonprofits
Urging folks to open their hearts and wallets
Raising money for charities
Learning new skills
Making a difference.
What was the game-changer?

Rehl Financial Advisors
Flourishing 18-year business as CFP®
Helping folks with money
Focusing on surviving spouses after husband's death
Publishing "*Moving Forward on Your Own:*
A Financial Guidebook for Widows."
"What came next?"

Encore career launched
Selling RFA business
Speaking, writing
Researching, empowering widows
Crisscrossing country for 300 presentations.
"Then you retired?"

Now "ReFired"—NOT vintage retirement
Centering on five "F" words:
Family, **F**un, **F**ocused-purpose,
Friends and **F**itness (body, mind, spirit, & money)
Creating as a legacy writer and nonprofit advocate.
Fantastic Chapter!

Please continue reading the next page. .

About Kathleen M. Rehl, PH.D., CFP®, CeFT® Emeritus

Kathleen owned Rehl Financial Advisors for 18 years before transitioning to a six-year encore career focused on empowering widows through speaking, writing, and research. As a financial planner, she specialized in working with widows. After her husband's passing, she authored the award-winning book Moving Forward on Your Own: A Financial Guidebook for Widows. Now in her 78th year, she embraces "reFirement," inspiring legacy and longevity planning while continuing to empower widows financially. Kathleen is an Adjunct Faculty member at The American College of Financial Services. She served as a gift planning officer and university professor years before. Her work has been featured in prominent publications like the *New York Times, Wall Street Journal, Next Avenue, Kiplinger's, CNBC, Nerd's Eye View, Humble Dollar, Sixty & Me, AgeBuzz, Rethinking65*, and more. Practicing positive aging, Kathleen continues to create and contribute, joyfully using her skills and experiences to encourage others to live their best lives.

Education and Credentials

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

Publications

- Over 200 professional, academic, and popular publications; go here for a list of articles about Kathleen's work
- *I Wrote Stories with My Grandma*, by Christian Ngandu with Kathleen M. Rehl, eBooklet, 2023
- *Storied Tables of Caffè Lena: Preserving the Story & Spirit of a Legendary Venue*, eBooklet, 2020
- *LEGACY LIFEPRINT™: Sharing Your Story, Values, Wealth, and Aspirations for Future Generations* 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
- *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

In the News—Partial Listing

- *AARP Bulletin*
- *ACP Financial Focus*
- *Advisor One*
- *Advisor Perspective*
- *AgeBuzz*
- *Blueleaf*
- *Bottom Line Personal*
- *Broker World*
- *CBS & Fox News*
- *Chautauquan Daily*
- *Citizen-Times.com*
- *CNBC*
- *Financial Advisor IQ*
- *Financial Planning Magazine*
- *Financial Focus*
- *FINRA*
- *Florida Today*
- *Gather*
- *Humble Dollar*
- *Inside Information*
- *Investment Advisor*
- *Investment News*
- *Journal of Financial Service Professionals*
- *Kiplinger's Retirement Report*
- *Miami Herald*
- *MoneyNews.com*
- *Mountain Express*
- *NAPFA Advisor Magazine*
- *Next Avenue*
- *New York Times*
- *OnWallStreet.com*
- *Reader's digest*
- *Research Magazine*
- *Rethinking65*
- *Reuters*
- *Sixty & Me*
- *Tampa Bay Times*
- *ThinkAdvisor*
- *US News & World Report*
- *US Army SOS Newsletter*
- *USA Today*
- *Vanguard Group*
- *Wall Street Journal*

Professional History

- 5/2023-current—Adjunct Faculty at The American College of Financial Services (CAP® program)
- 2020-current—Storyteller inspiring legacy and longevity planning plus empowering widows financially
- 2014-2019—Empowering Widows Financially™ at Rehl WEALTH Collaborations LLC and Sudden Money Institute teaching faculty
- 1995-2013—Owner of Rehl Financial Advisors—Certified Financial Planner™
- 1981-1995—VP of Development and Communications at Lutheran Social Services of Central Ohio; Director of Gift Planning at the National Foundation for Chiropractic Education and Research
- 1976-1981—Tenured Assistant Professor at Hood College, Frederick, MD, after a similar position at the University of Nebraska-Lincoln
- 1971-1975—Public school teacher and community college instructor, Madison, WI and Champaign, IL

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