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

Author, Educator, Mentor, Storyteller

●Empowering Widows Financially ●Inspiring Legacy and Longevity Planning

https://www.KathleenRehl.com

KathleenRehl@gmail.com

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Articles & More About Kathleen Rehl's Work

216 Stories

Date	Published By	Title & Link (older links may be expired)	Author
11/28/2024	*Open to Hope*	Moving Forward on Your Own: Empowering Widows (podcast)	Open to Hope Foundation
11/27/2024	*Nerd's Eye View*	Enhancing Client Conversations About Charitable Giving: Sample Questions, Scripts, And Tools For Better Engagement	Kathleen Rehl
11/13/2024	*Agebuzz*	Training As An End-Of-Life Doula, A Profound Experience	Kathleen Rehl
11/6/2024	*Sixty & Me*	Celebrating 3 Years Wine-Free: Choosing Health As I Age	Kathleen Rehl
9/11/2024	*Agebuzz*	Why I Want to Become an End-of-Life Doula	Kathleen Rehl
7/27/2024	*Sixty & Me*	I'm Aging But Not Growing Old	Kathleen Rehl
7/23/2024	*Rethinking65*	When the Unthinkable Happens	Kathleen Rehl
7/2024	*The Apple Tree Third Age Press*	Stage 4 poem	Kathleen Rehl
6/19/2024	*Agebuzz*	Draft Your Legacy Letter in 15 Minutes With 5 Easy Steps	Kathleen Rehl
5/30/2024	*Sixty & Me*	3 Secrets of Resilient Widows: Embrace Life on Your Own Terms	Kathleen Rehl
4/20/24	Open to Hope	Handling Your Own End-Of-Life Planning: A Thoughtful Goodbye	Kathleen Rehl
3/27/2024	*Agebuzz*	Elephant in the Room poem	Kathleen Rehl
3/26/2024	*Humble Dollar*	Not Wired to Retire	Kathleen Rehl
3/20/2024	*Sixty & Me*	My Husband Told Me to Find Another Partner . . . And To Watch Out For My Money	Kathleen Rehl
2/6/2022	*Agebuzz*	Embracing My 77th Birthday and Moving Forward	Kathleen Rehl
1/31/2024	*Nerd's Eye View*	Using A Testamentary Charitable Remainder Unitrust (T-CRUT) To Give Twice to Both Loved Ones and Charitable Organizations	Kathleen Rehl
1/15/2024	*Rethinking65*	Will New Widows Fire or Hire You?	Kathleen Rehl
10/31/2023	*Morningstar*	A New Way to Achieve Charitable Goals While Saving on Taxes	Kathleen Rehl
10/15/2023	*Sixty & Me*	Widows Rock! Thriving in Stage 3 of Widowhood	Kathleen Rehl
10/11/2023	*Agebuzz*	Navigating the Future: Our Checklist for Choosing a Continuing Care Retirement Community	Kathleen Rehl
9/23/2023	*Sixty & Me*	Navigating Financial Realities After Losing Your Spouse	Kathleen Rehl
8/23/2023	*Nerd's Eye View*	Legacy IRA" Rollover To A Charitable Gift Annuity: Using This New Tax-Advantaged Opportunity To Help Clients Achieve Charitable And Retirement Goals	Kathleen Rehl

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8/17/2023	*Sixty & Me*	After Heartbreak, New Widows Must Revisit Their Finances	Kathleen Rehl
6/7/2023	*Agebuzz*	Waiting List	Kathleen Rehl
5/18/2023	*Sixty & Me*	Confronting the Elephant in the Room: The Importance of Your Estate, Legacy and End-of-Life Planning	Kathleen Rehl
2/11/2023	*Humble Dollar*	Better Than Cake	Kathleen Rehl
2/15/2023	*Agebuzz*	Love Lasts Forever	Kathleen Rehl
1/26/2023	*Next Avenue*	I Helped My Mother to Live and Later Die	Kathleen Rehl
1/4/2023	*Agebuzz*	Better Than a New Year's Resolution—Set Your Big Grin Goal for 2023	Kathleen Rehl
1/3/2023	*Sixty & Me*	I Celebrated One Year Wine-Free	Kathleen Rehl
10/2/2022	*YouTube*	Recording of What to Do Before You Kick the Bucket: Effective Estate & Legacy Planning	Attorney Andrew Ward & Kathleen Rehl
9/21/2022	*Agebuzz*	What to Do Before You Kick the Bucket	Kathleen Rehl
9/10/2022	*Humble Dollar*	All Together Now	Kathleen Rehl
9/2/2022	*CNBC*	Divorced, Widowed Women Are Most At Risk of Retiring Earlier Than Expected	Sarah O'Brien
8/2/2022	*Purposeful Planning Institute*	I'm Giving Twice with a T-CRUT (recorded webinar)	Kathleen Rehl John A. Warnick
7/20/2022	*FSP Journal Live*	Widows & Research podcast	Kathleen Rehl John Grable
7/1/2022	*Journal of Financial Service Professionals Vol. 76, No. 4*	Financial Satisfaction Postwidowhood: The Role of Resilience	John E. Grable Laura Mattia Carrie L. West, Linda Y. Leitz Kathleen Rehl
6/22/2022	*Agebuzz*	Focus on Investment Factors You Can Control	Kathleen Rehl
6/17/2022	*Mindful Money*	Financial Advice for Widows & Enjoying ReFirement	Jonathan DeYoe Kathleen Rehl
6/8/2022	*Sixty & Me*	Jane Fonda and I Happily Agree About Drinking After 60	Kathleen Rehl
5/26/2022	*CNBCk*	Here Are The First Financial Steps to Make After Losing a Spouse	Annie Nova
5/17/2022	*Humble Dollar*	Better Than Dollars	Kathleen Rehl
3/23/2022	*Agebuzz*	The Joy of Reading Picture Books Virtually with My Long-Distance Grandchild	Kathleen Rehl
2/9/2022	*Agebuzz*	You Are Wealthier Than You Think	Kathleen Rehl
1/31/2022	*Sixty & Me*	Thoughts After My 75th Birthday!	Kathleen Rehl
11/17/2021	*Agebuzz*	I'm "Giving It Twice," Helping My Son & Leaving a Lasting Legacy	Kathleen Rehl
10/11/2021	*Sixty & Me*	Two Ways I Found Later Life Love	Kathleen Rehl
9/22/2021	*Humble Dollar*	"Giving Twice"	Kathleen Rehl

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7/14/2021	*Agebuzz*	Pennies from Heaven: Gifts from My Guardian Angel	Kathleen Rehl
7/5/2021	*ThinkAdvisor*	How to Help Widows Avoid Financial Risks of Remarriage	Jane Wollman Rusoff
7/4/2021	*Sixty & Me*	5 Easy Steps to Write a Legacy Letter for Family and Friends	Kathleen Rehl
6/14/2021	*Sixty & Me*	How We Hosted Camp Grandma & Grandpa" During the Pandemic	Kathleen Rehl
6/2/2021	*Agebuzz*	I Remember Growing Up in a Four-Generation Household	Kathleen Rehl
5/4/2021	*Sixty & Me*	Does Your Mother's Legacy Shape Your Own?	Kathleen Rehl
3/16/2021	*YouTube*	Next Gen Mentoring Forum interview focused on practical aspects of working with widows	CA Lutheran University Financial Planning
2/17/2021	*Sixty & Me*	Try Something New: Write a Poem and Stretch Your Brain	Kathleen Rehl
2/12/2021	*Humble Dollar*	Final Thoughts	Kathleen Rehl
2/3/2021	*Agebuzz*	Shake Up Your Brain a Bit: Get Outside Your Comfort Zone	Kathleen Rehl
11/27/2020	*Sixty & Me*	Put Your Gratitude into Action—Not Only for the Holidays!	Kathleen Rehl
11/4/2020	*Agebuzz*	How I Learned to Never Say Never	Kathleen Rehl
10/1/2020	*Journal of Financial Planning*	Self-empowerment among widows: A financial planning perspective	Laura Mattia John E. Grable Carrie L. West, Linda Y. Leitz Kathleen Rehl
9/9/2020	*Sixty & Me*	What I Learned from my Grandmother, the Entrepreneur	Kathleen Rehl
8/5/2020	*Agebuzz*	The Joy of Writing Poetry Now!	Kathleen Rehl
5/1/2020	*Book*	Storied Tables of Caffe Lena: Preserving the Story & Spirit of a Legendary Venue	Kathleen Rehl Charlie Pickett
4/7/2020	*Agebuzz*	Write Your Personal Legacy Letter for Family & Friends	Kathleen Rehl
3//2020	*Sixty & Me*	How to Create and Share Your Lasting Legacy of Love	Kathleen Rehl
3/22/2020	*CNBC*	Widows can lead a rewarding life after grief and growth stages	Kathleen Rehl
3/13/2020	*CNBC*	After initial grief, new widows must reexamine their finances	Kathleen Rehl
3/6/2020	*CNBC*	Recent widows need financial guidance after a spouse's death	Kathleen Rehl

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10/27/2019	*Sixty & Me*	Choose Refirement Rather Than Vintage Retirement! These 7 Questions Will Help You Find Your Direction	Kathleen Rehl
10/23/2019	*Agebuzz*	Girlfriends Getaway	Kathleen Rehl
08/09/2019	*Forbes*	How Widows Can Better Manage Their Money	John Wasik
07/30/2019	*Investment News*	Retirement Repair Shop with Mary Beth Franklin – Episode Seven	Mary Beth Franklin
07/16/2019	*Agebuzz*	After The Hearse, Don't Be A Purse Or A Nurse!	Kathleen Rehl
07/11/2019	*Sixty & Me*	6 Know-It-All Statements New Widows Don't Want to Hear (And Alternatives That Are Actually Helpful)	Kathleen Rehl
06/27/2019	*Center for Retirement Research at Boston College*	Widows: Manage Your Grief, Finances	Squared Away Blog
05/23/2019	*Investment News*	Dealing with widows requires empathy and patience	Mary Beth Franklin
05/15/2019	*Reuters*	Depression risk could derail your retirement portfolio	Beth Pinsker
05/01/2019	*Agebuzz*	Dollar For Dollar: Determining Your Financial Strategy As A New Widow	Connie Zuckerman
04/13/2019	*The Bulletin*	How grieving widowed spouses can cope with financial matters	Susan B. Garland
04/11/2019	*The New York Times*	You're a Widow. Now What?	Susan B. Garland
04/01/2019	*Living Lutheran*	Couple Shines Their Light	Erin Strybis
03/29/2019	*The Wall Street Journal*	Estate Planning for the Uninitiated	Anne Tergesen
03/28/2019	*Humble Dollar*	Better Than Golf	Kathleen Rehl
03/01/2019	*New York Times*	You're the 'Money Person' in Your Relationship? That's Problematic	Elizabeth Harris

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02/20/2019	*Think Advisor*	The 3 Stages of Widowhood, and How Advisors Can Help	Jane Wollman Rusoff
02/14/2019	*Next Avenue*	Next Avenue Readers On What Love Looks Like	Kathleen Rehl
01/08/2019	*Nerd's Eye View*	#FASuccess Ep 106: Empowering Widows Financially By Helping Them Navigate The 3 Stages of Widowhood	Michael Kitces Kathleen Rehl
12/21/2018	*Sixty & Me*	Don't Make New Year's Resolutions: Mature Women Enjoy This Alternative	Kathleen Rehl
12/01/2018	*Insurance News Net Magazine*	After The Funeral: Navigating The Three Stages of Widowhood	Kathleen Rehl
11/17/2018	*New York Times*	Women Who Become Widows Are Faring Better Financially	Tammy LaGorce
11/15/2018	*Time*	The One Thing Married Women Should do to Protect Their Finances Before They Retire	Ryan Derousseau
11/05/2018	*Humble Dollar*	Merging Money	Kathleen Rehl
11/01/2018	*Sixty & Me*	Marriage After 60: I Love Two Men, With the Blessings of Both	Kathleen Rehl
08/13/2018	*Sixty & Me*	How a Getaway With Girlfriends Can Enhance Your Friendships in Retirement	Kathleen Rehl
06/20/2018	*Kbkweatlh connection*	Do You Want to be Hired or Fired by the New Widow?	Kathleen Rehl
5/10/2018	*Sixty & Me*	What Money Personality Type Are You? Spender, Idealist, Star, Avoider Or Something Else?	Kathleen Rehl
02/09/2018	*Sixty & Me*	Never Say "Never" When It Comes To Finding Love After A Loss	Kathleen Rehl
02/05/2018	*Sixty & Me*	New Guidebook For Widows Offers Hope, Financial Wisdom and a Positive Path Forward	Margaret Manning
02/01/2018	*Financial Adviser News*	How Advisors Can Tailor Their Services For Widows	Karen Demasters

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01/19/2018	*USA Today*	How to prepare financially for being a widow/widower	Robert Powell
12/02/2017	*Journal of Financial Planning*	Enhancing Financial Confidence Among Widows: The Role of Financial Professionals	John E. Grable Carrie L. West Linda Y. Leitz Kathleen Rehl Carolyn C. Moor Michele Neff-Hernandez Susan Bradley
10/05/2017	*Sixty & Me*	After 50 Dating: 10 Financial Questions To Ask Your Partner Before Committing	Kathleen Rehl
08/25/2017	*NAPFA Advisor Magazine*	10 Questions To Ask Your Widowed Clients Who Re-partner	Kathleen Rehl
08/21/2017	*Sixty & Me*	Why Are Mature Women Living With Their Partners Rather Than Marrying?	Kathleen Rehl
07/03/2017	*Sixty & Me*	Are We Too Old For Boyfriends In Our 60s?	Kathleen Rehl
06/07/2017	*Seeking Alpha*	5 Financial Planning Tips For Working With Recent Widows	Jack Waymire
05/01/2017	*Journal of Financial Service Professionals Vol. 71, No. 3*	Helping Repartnered Widows Navigate Romance and Finance: The Role of Financial Advice	Kathleen Rehl Carrie L. West Linda Y. Leitz John E. Grable Carolyn C. Moor Michele Neff-Hernandez Susan Bradley
03/18/2017	*Financial Advisor IQ*	Have a Client in Crisis? Take It Slow and Easy	Pedro Silva
03/10/2017	*Advisor Connect: Financial Insights & Growth Strategies*	Will You Be Hired or Fired by the New Widow?	Kathleen Rehl
02/08/2017	*FINRA: The Alert Investor*	Managing Money Through Grief: 10 Tips for Widows and Widowers	Alice Gomstyn
01/13/2017	*Sixty & Me*	Financial Advice For Widows: 9 Steps To Help You Get Control And Move Forward	Kathleen Rehl
12/20/2016	*Sixty & Me*	Give Yourself a Legacy Gift By Repurposing Meaningful Jewelry	Kathleen Rehl

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11/4/2016	*Sixty & Me*	Financial Advice for Widows: What To Do Before You Remarry	Kathleen Rehl
10/17/2016	*Reader's digest*	10 Things You Should Never Say to a Widow	Deborah Weiss
10/04/2016	*Sixty & Me*	Love Is Eternal, But, Life Isn't! Facing the Chance of Becoming a Widow	Kathleen Rehl
09/14/2016	*Sixty & Me*	5 Big Mistakes that Widows Make and How to Avoid Them	Kathleen Rehl
08/17/2016	*CNBC*	Suddenly single: The realities of going from two to one	Ilana Polyak
06/20/2016	*Next Avenue*	I Planned for Life as a Widow, But Got a Lot Wrong	Ellen Uzelac
04/29/2016	*Tampa Bay Times*	Why are more Baby Boomers who can afford to buy a home renting instead?	Susan Taylor Martin
04/23/2016	*Sentinel Online*	Expert offers story, advice on widowhood	Judy Bryan
01/13/2016	*CBS & Fox News: KEYC Mankato*	Preparing Women For Financial Life After The Death Of Their Spouse	Shawn Loging
01/05/2016	*Journal of Financial Service Professionals Vol. 70, No. 1 pp.53-60*	Widows' Voices: The Value of Financial Planning	Kathleen Rehl Carolyn Moor Linda Leitz John Grable
10/28/2015	*Financial Planning*	Ensuring Success When Switching to a Flat Retainer Fee Model	Carolyn McClanahan
10/05/2015	*Financial Advisor IQ*	Keeping Widows from Leaving Calls for a Delicate Dance	R.A. Monroe
9/28/2015	*Investment Advisor*	Marketing Tips of the Trade	Olivia Mellan
08/10/2015	*Bankrate.com*	A guide for widows on how to manage money	Julie Landry Laviolette
07/27/2015	*Susan's Women's Writing Circle blog*	A Widow's Memoir Moment	Kathleen Rehl
07/20/2015	*The Chautauquan Daily*	Rehl to advise widows about financial transition	Deborah Trefts
07/18/2015	*New Haven Register*	DOLLARS & SENSE: A little support goes a long way	John Fitts

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05/15/2015	*Investment News*	How to Talk to Clients Who Have Just Been Widowed	Kathleen Rehl
04/03/2015	*Sudden Money Institute - SMI Blog*	Sharing Your Story, Values, Wealth, and Aspirations for Future Generations	Kathleen Rehl
03/24/2015	*Sudden Money Institute - SMI Blog*	On Hosting Events for Widows	Kathleen Rehl
12/01/2014	*Broker World Magazine*	How to Help Your Widowed Clients Make Wise Decisions with Life Insurance Benefits	Kathleen Rehl
11/05/2014	*JournalTimes.com*	Retirement Income for Surviving Spouses	Justus Morgan
10/27/2014	*Sudden Money Institute - SMI Blog*	A Tool To Use With Your Widowed Clients	Kathleen Rehl
10/01/2014	*ACP Financial Focus*	Recommendations for Recent Widows	Kathleen Rehl
10/01/2014	*Broker World*	Three Tips on What to Say to Your Widowed Client	Kathleen Rehl
10/10/ 2014	*Wall Street Journal*	Wealth Adviser: Are You Guilty of 'Due-Diligence Lite' on Funds?	Kevin Noblet
09/09/2014	*Wall Street Journal*	A 'Financial Retreat' for a Widow	Austin Kilham
08/17/2014	*Investment News*	Advising Women Through Transitions	Staff
08/03/2014	*The Chautauquan Daily*	Rehl to Advise Widows On Emotional And Financial Transitions	Deborah Trefts
07/23/2014	*Investment News*	Advisers Need to be Nurturers When Helping a Woman Through Life Changes	Alessandra Malito
07/10/2014	*CNBC*	Widows: Don't Let Grief Cloud Financial Judgment	Ilana Polyak
Summer 2014	*Woodbury Connection*	6 Tips for Working with New Widows	Kathleen Rehl
06/17/2014	*Blueleaf*	What to Say [and NOT Say] to a Grieving Widowed Client	Kathleen Rehl
05/30/2014	*Miami Herald*	When Husband Dies, Widows Must Deal with Grief And Finances	Julie Landry Laviolette

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05/12/2014	*Blueleaf*	Faced with This Unpredictable Client Moment, Pause and Don't Talk About the Market	Kathleen Rehl
04/28/2104	*Research Magazine*	Grieving Clients, Sensitive Advisors	Ellen Uzelac
04/15/2014	*CNBC*	From Grief TO Growth and Beyond, A Widow Can Lead A Rewarding Life	Kathleen Rehl
04/20/2014	*CNBC*	After Grief, New Widows Must Reevaluate Finances	Kathleen Rehl
04/10/2014	*CNBC*	New Widows Take Stock of Finances	Kathleen Rehl
03/18/2014	*CNBC*	What do Women Want? Financial Advisors Who Get It	Kelley Holland
02/24/2014 (March print issue)	*Investment Advisor*	Working with Widows ~&~ Learning More About Working with Widows	Olivia Mellan
02/07/2014	*Citizen-Times.com*	Widows Need Financial Education	Al Davis
01/21/2014	*Financial Advisor IQ*	Office Decor Is More Important Than You Think	Miriam Rozen
01/16/2104	*MoneyNews.com*	Senior Scams Hit Victims with $2.9 Billion in Annual Losses	Michelle Smith
01/12/2014	*Tampa Tribune*	Widowed Financial Planner Offers Workshop In Brandon	Barbara Routen
01/12/2014	*Tampa Tribune*	Speaker's Concern for Widows Started On 9/11	Barbara Routen
01/04/2014	*CNBC*	More Financial Fraudsters are Targeting Seniors	Kelley Holland
12/01/2013	*Inside Information*	Planning In Widowhood	Bob Veres
12/01/2013	*Financial Planning magazine & web*	7 Financial Advisors With Great Side Gigs	Staff
11/01/2013	*Gather-national magazine of Women of the ELCA*	Advice for New Widows	Kathleen Rehl

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10/01/2013	*Wall Street Journal*	Wealth Adviser: Helping Federal Employees Cinch the Belt Another Notch	
09/30/2013	*CNBC*	Expert Offers Financial Advice For the Recently Widowed	Kathleen Rehl
06/20/2013	*Investment News*	15 Transformational Advisers: Harold Evensky & Deena Katz	Jeff Benjamin
06/01/2013	*Investment News*	An Unconventional Exit From the Business	Liz Skinner
06/01/2013	*Mindful Money Magazine (IPad app)*	Kathleen M. Rehl Ph.D., CFP® speaks at a Workshop for Widows, Wives & Friends	Fern Alix LaRocca
05/28/2013	*Reuters*	Widows and Divorcees Put Money In Motion	Beth Pinsker
05/17/2013	*The Forum of Fargo-Moorhead*	A Vulnerable Time: Widows Need to Guard Against 'Financial Wolves'	Staff
04/11/2013	*Lake Oswego Review*	Finding The Right Way For Widows	Staff
02/19/2013	*Advisor Perspectives*	Six Recommendations for Working with Widows	Kathleen Rehl
02/09/2013	*USA Today*	MoneyWatch: Better to Rent Or To Sell A House?	Kathleen Rehl
01/23/2013	*Florida Today*	Mary Baldwin: New Widow Overwhelmed by Financial Decisions	Mary Baldwin
01/01/2013	*Spacecoast Living.com*	Suddenly Single. Now What?	Robert J. Rall
01/01/2013	*ACP Financial Focus*	Put Your Gratitude Into Action	Kathleen Rehl
11/01/2012	*NAPFA Advisor Magazine*	Practical Points in Serving Widows	Kathleen Rehl
Fall 2012	*Ft. Leonard Wood Survivor Outreach Services Newsletter*	Financial Information for Survivors Page 3	Staff
08/01/2012	*Army Survivor Outreach Services Newsletter*	Mark Her Words Pages 4-7	Mark Dunlop
06/21/2012	*Think Advisor*	Divorcees, Widows Use Advisors More Than Men	Joyce Hanson

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05/18/2012	*Financial Advisor a blog by Dow Jones*	How to Get A Wife Interested In Investing	Staff
05/07/2012	*The Wall Street Journal*	Five Mistakes You May Be Making	Veronica Dagher
03/13/2012	*onwallstreet.com*	Women Advisors Forum: Ways Wealth Managers Can Work with Widows	Staff
01/15/2012	*Bottom Line Personal*	After a Spouse Dies… Important Financial Steps to Take Right Away	Kathleen Rehl
12/31/2011	*The New York Times*	Footsteps to Follow in the Coming Year	Ron Lieber
12/23/2011	*Marotta on Money*	Helping Widows Move Forward On Their Own	David John Marotta
11/25/2011	*Investment News*	What Worries Advisers As We Enter 2012	Fred Gabriel
10/17/2011	*The Vanguard Group*	A Widow's Guide To Financial Decisions	Staff
10/12/2011	*A Dow Jones Newswires Column*	Listening First is Key With Widows	Staff
10/11/2011	*Pocono Record*	5 Financial Rules for Grieving Spouses	Erin Baehr
10/02/2011	*Investment News*	Patience Is Key When Working With Widows	Jim Pavia
10/01/2011	*Senior Market Advisor*	Estate Planning for Senior Women	Staff
09/25/2011	*St. Petersburg Times*	Financial Planner's Own Experience Helps Her Guide Widows In Money Matters	Susan Taylor Martin
09/19/2011	*The Wall Street Journal*	Alone…and Confused	Veronica Dagher
09/04/2011	*Investment News*	A Passion for Working with Widows	Jeff Benjamin
09/03/2011	*The New York Times*	For the Recently Widowed, Some Big Financial Pitfalls to Avoid	Ron Lieber
08/29/2011	*Kiplinger's Retirement Report*	A To-Do List for the Surviving Spouse	Susan B. Garland
08/01/2011	*Squared Away Blog*	Widowed Advisor Strives to Help Others	Staff
07/01/2011	*NAPFA Advisor*	Affairs of Estate (The Rehl Approach)	Staff

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