

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 tenure
 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

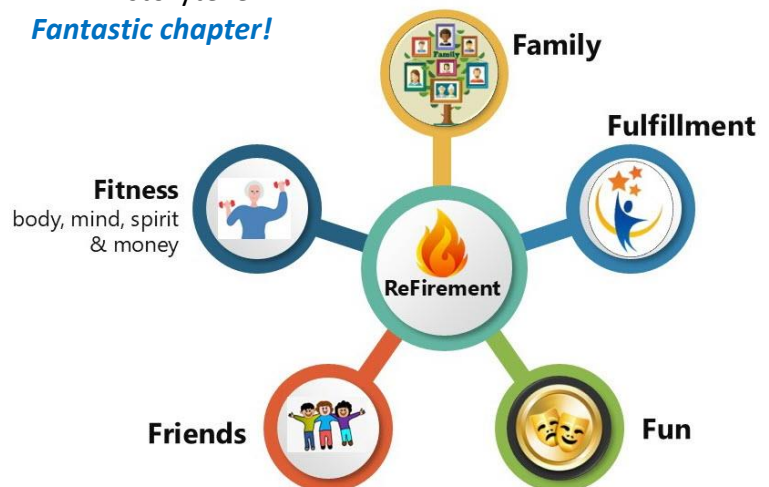
Selling RFA business
 Speaking, writing
 Researching, empowering widows
 Crisscrossing country for 300 presentations.

"Then you retired?"

Now "ReFired"—NOT vintage retirement

Focusing on five "F" words:
 Family, Fulfillment, Fun, Friends, and Fitness
 Creating as an author, educator, mentor, and
 storyteller.

Fantastic chapter!



Please continue . . .

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

Kathleen Rehl spent 18 years as the owner of Rehl Financial Advisors before transitioning to a six-year encore career focused on empowering widows through her speaking, writing, and research. A seasoned financial planner specializing in serving widows, she turned her loss experience into the award-winning book [Moving Forward on Your Own: A Financial Guidebook for Widows](#). Now in her 78th year, Kathleen embraces “reFirement,” inspiring others in legacy and longevity planning while continuing to empower widows in financial matters. She also serves as Adjunct Faculty at The American College of Financial Services. She has previous experience as a university professor and gift planning officer. Her insights have appeared in prominent outlets such as *The New York Times*, *Wall Street Journal*, *Next Avenue*, *Kiplinger’s*, *CNBC*, *Nerd’s Eye View*, *Humble Dollar*, *Sixty & Me*, *AgeBuzz*, and *Rethinking65*. Kathleen practices positive aging, joyfully using her knowledge and experience to inspire others to live their best lives.

Education and Credentials

- INELDA Trained End-of-Life Doula, October 2024
- 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 More](#) 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

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

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

