



LEGACY LIFEPRINT™

Sharing your story, values, wealth,
and aspirations for future generations

Rehl WEALTH 
COLLABORATIONS

A gift to you from
KATHLEEN M. REHL
PH.D., CFP®, CeFT™

~ Share the Love! ~

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Please reference Kathleen and her work, including *Moving Forward on Your Own: A Financial Guidebook for Widows*, when you share this publication.

You may also send others to her website at
www.KathleenRehl.com. ~Thanks!

April 2015



Blessings in your legacy planning.
You have many riches from your life to share
with your loved ones ... far beyond just your
financial assets. Your life is your true legacy.

Kathleen

Rehl WEALTH
COLLABORATIONS

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Use this booklet* to share your legacy with family and friends. It's a way to pass on much more than money and material possessions as you share your true legacy with those you love.

READ THROUGH the following page headings, such as *To Get Started*, *Balance in Life*, and *Reflections*, and select pages that have meaning for you.

Then read the individual statements on the pages you've chosen. When you find ones that fit you, put a check mark beside them. You may edit any phrase freely, adding or crossing out words. You can also add your own personal statement.

Some of these items may help you think about your unique way of saying things. Write your thoughts in the extra space on each page. Or maybe you could tell a little story that fits a particular section (use extra paper if you need).

When you are finished, simply leave the booklet as is, or combine sentences together on a separate page(s) for your loved ones and friends. You may want to do different versions—for example, one general version and another distinctive version just for a grandchild.

**This approach is modeled with permission after "The Legacy Letter Writing Guide Workbook," by Barry K. Baines, M.D.*

To GET STARTED

- Dear family and friends (or write in the name of a certain person _____):

I'm writing to tell you about some very meaningful events that have happened during my lifetime.

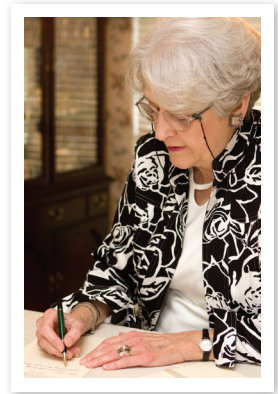
- Dear children: I've written a few words to share some of my ideas about what has been important to me.

- To my family: In reading my *Legacy Lifeprint*, I hope you will smile as you see what I've written because ...

- To you who are reading my *Legacy Lifeprint*, please know how much you mean to me and that I love you a lot.

- My dear family: Life has been such a fascinating and interesting adventure, with you a special part of this journey.

- I've used the space here to record a special thought or story:



BALANCE IN LIFE

- Always remember that family, friends, and faith are what really matter in life.
- Focus on what you value, not just on the value of what you have.
- Appreciate the importance of balance among family, work, and the spiritual and physical aspects of life. I've tried to do this, even though it has been hard sometimes.
- It's easy to let things get out of balance. When they do, life can get out of control and become miserable.
- The best way to really know yourself is to embrace life fully and in a balanced way as you pursue your dreams.
- Body, mind, and spirit: these three aspects of life are all essential and require monitoring so there's a sense of balance in what you do.
- Remember to take time to play and smell the roses along the way.
- I've used the space here to record a special thought or story:

EDUCATION / LEARNING / KNOWLEDGE

- Learning new things always fascinated me and helped me to grow as a person.
- You can always learn new things throughout your entire life. This is a value I have always cherished.
- Make your future bigger than your past.
- Learning is what life is all about! It's fascinating to study and grow.
- I placed great value on a good education for my children.
- I hope you will have a passion for learning. Learn for the sake of learning, not just for a future career or how much money you can make.
- I've used the space here to record a special thought or story:

FAMILY AND FRIENDS

- As I've grown older, I continue to value family more and more. It's so essential to keep in touch by calling or writing.

- So much of who I am today is because of Grandma _____. She was a very special lady in many ways including _____

_____.



- I had a good relationship with my Grandpa _____. From him I learned that I should _____
_____.

- I hope you all continue to get along well. I encourage you to make plans for regular family reunions and gatherings.

- If you find a good and true friend, hold on to him or her as closely as you can. Real friendship is a treasure.

- I've used the space here to record a special thought or story:

_____.

BEING HONEST, TRUTHFUL, AND SINCERE

- Integrity has been central in my life. Always try to do what you say you will do.
- Sometimes it's hard to be completely honest with others because we think we might hurt their feelings. But it's better to be totally frank. Yes, strive for honesty.
- Listen carefully to what others say to you. Truly care for them by listening instead of talking about yourself.
- Be sincere and honest and learn how to recognize these qualities in others. These people are your true friends.
- I've used the space here to record a special thought or story:

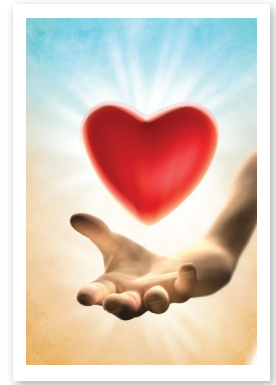
THE IMPORTANCE OF HUMOR

- Having a good sense of humor is key and can sometimes really save the day.
- Keep a sense of humor. All will always look better tomorrow.
- Humor can be a large part of every person's day. Laughter lightens the load and is quite healthy.
- Don't be afraid to laugh at yourself. Relax—don't take everything so seriously!
- I've used the space here to record a special thought or story:



GIVING

- Whatever I've given in my lifetime has been returned ten times and more to me—friendships, opportunities, experiences, business ventures, and more. It's so true that the more you give, the more you'll be blessed. Just works that way.
- I've enjoyed being part of this organization and supporting their work: _____
 _____. It was about more than just writing a check. I really support their mission and the significant work they do.
- Actively express your gratitude. Live a grateful life. You'll be healthier for it in many ways.
- Through my sharing, I've learned a lot and received much satisfaction.
- I've used the space here to record a special thought or story:



LEARNING FROM YOUR MISTAKES

- Learn from your mistakes. It's impossible to be successful in everything. You have to keep trying things to succeed. Failures can be stepping-stones to real success.
- Don't be afraid of making mistakes because you can learn from them, paving the way to future success.
- If you focus on what matters to you, failures may come, but they will be fewer.
- I've used the space here to record a special thought or story:



RELIGION / SPIRITUALITY

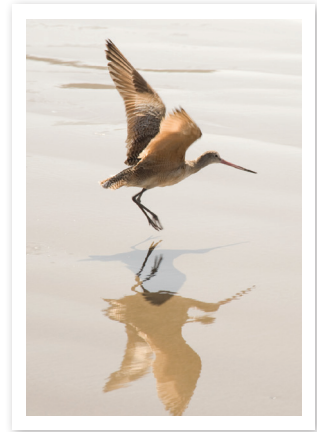
- I hope you continue the traditions and faith of _____ (fill in your faith community) and pass these on to future generations.
- My focus has been to serve God by creating a balance between family, friends, profession, and community.
- I've never offered much in the way of spiritual guidance. But I hope the way I've lived my life has served as an example of my own moral code.
- Faith in God/spirituality is central to a good life. I am not all that religious, but I am a believer.
- My faith in God has helped me survive incredible challenges. At times I could not have made it without God's help.
- I've used the space here to record a special thought or story:

LESSONS I'VE LEARNED

- When I found my passion and purpose in life, everything really came together for me. I wish the same for you.
- Set personal goals and work toward these. I've found it to be helpful to have a personal mission statement. Mine has been _____
_____.
- Act on situations and opportunities, rather than be acted upon.
- Don't make assumptions about what people need. Ask them.
- Be willing to be open. You'll learn more by listening than by speaking.
- If you work hard and keep an open mind, success will come to you.
- I've used the space here to record a special thought or story:

REFLECTIONS

- Remember that one person can make a difference. Your actions matter in our world.
- Stay true to yourself and make your best effort.
- Be courageous and persistent in your efforts.
- If you measure your achievements against those of others, you might be disappointed. Rather, benchmark your progress on yourself.
- Don't be easily discouraged.
- Life is such a precious gift. Savor its sweetness.
- I've used the space here to record a special thought or story:



HOPES FOR THE FUTURE

- I want you to have fond memories about our times together. Please try hard to forget the disappointments.
- I hope you are as fortunate as I was in finding a soulmate with whom to share your life.
- Follow your chosen path, study things that interest you, and use your education to continue making progress.
- Try to be a part of the solution, not part of the problem.
- Visualize the way things ought to be, and help people move in that direction.
- I've used the space here to record a special thought or story:



LOVE

- My love for my grandchildren is almost too great to express in words. I have tried to show it in various ways.
- Be generous with your love.
- Show people you love that you care for them and tell them, too. Never be afraid to say, “I love you.”
- To my precious family: I love you so very much. You have been such a vital part of my life.
- I hope you know that I loved you intensely and unconditionally—no matter how upset you might have been with me at times.
- I’ve used the space here to record a special thought or story:

FORGIVENESS

- I apologize for the times I wasn't the parent you would have liked me to be. Please know that I really tried my best.
- Don't be afraid to say, "I'm sorry, please forgive me. I was wrong."
- Forgive whatever misunderstandings there are between you and those you love.
- Forgive me if I have hurt you in any way or if I have been too hard on you at times.
- Please try to resolve your issues with family members who aren't close to you now. Pray for reconciliation.
- I've used the space here to record a special thought or story:

OTHER REQUESTS

- If it should ever become necessary, please see to it that your (mother) or (father) remains comfortable financially and is taken care of otherwise.
- Enrich your mind, exercise your body, and feed your spirit with music, art, meaningful work, friends, and helping your community.
- Be open-minded and curious about the world.
- Try to find joy and beauty in the simple, ordinary things that life has to offer.
- Time is precious, so don't waste it or take it for granted.
- I've used the space here to record a special thought or story:



CONCLUDING THOUGHTS

- You have been such a wonderful source of joy and strength for me. I love you very much.
- Finally, I am thankful for all those who have been good to me and have been helpful. I've lived a good life. My hope is that you also have a good life.
- As I close here, I have to chuckle because I realize that even at this time, I do not stop giving directions. But I mean well. Bon voyage!
- My love will always be with you—you get to keep it and remember it forever.
- I love you all.
- What I hope you remember most about me is that _____
_____.





KATHLEEN M. REHL, Ph.D, CFP®, CeFT™, shares insightful expertise and experience. She is a leading authority on widows and their financial issues. A widow herself, Kathleen is passionate about inspiring her “widowed sisters” in transition and their advisors. She is the author of the multi-award-winning book, *Moving Forward on Your Own: A Financial Guidebook for Widows*.

Her work has been featured in publications including the *Wall Street Journal*, *New York Times*, *Kiplinger’s*, *Money*, *U.S. News and World Report*, *CNBC*, *Reuters*, *USA Today*, *AARP Bulletin*, and more. Kathleen’s national research has been published in the peer-reviewed *Journal of Financial Services Professionals*. Enthusiastic sponsors of her presentations include financial firms, industry affiliates, non-profits, professional organizations, and U.S. Army Survivor Outreach Services centers worldwide.

After 17 years of providing personal financial advice, she sold her business at the end of 2013 to devote more time to teaching, speaking, and writing. Kathleen is the founder and owner of Rehl WEALTH Collaborations LLC. She is also on the faculty of Sudden Money Institute and serves as the Dean of Women for the Purposeful Planning 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.

**SUDDEN  MONEY
INSTITUTE**

For those desiring advanced credentialing, the Certified Financial Transitionist™ program is offered by Sudden Money Institute. A compact virtual training program focuses on those who specialize in working with widows.

Moving Forward on Your Own

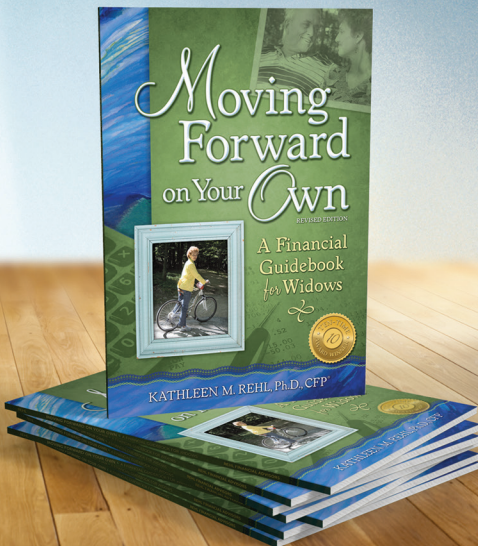
— A Financial Guidebook for Widows —

Kathleen M. Rehl, Ph.D., CFP®, CeFT™

What do you do when a friend's or relative's husband dies?

When the time is right, give her this book,
as a gift of care and compassion.

- ◆ Winner of 10 national and international book awards
- ◆ Featured in *The New York Times*, *Kiplinger's*, *Wall Street Journal*, *USA Today*, *AARP Bulletin*, *U.S. News & World Report*, *CNBC*, and more
- ◆ The U.S. Army uses this guidebook in their Survivor Outreach Services centers worldwide
- ◆ Designed to help heal a woman's soul as well as focus on her financial issues
- ◆ Kathleen donates a portion of guidebook sale proceeds and speaking fees to nonprofits that benefit widows



"As a recent widow, I found this book to be extremely useful. In addition to the financial help, the paintings, photos, and quotations add a nice touch."

Mrs. D. McLarin
Amazon review

Available at www.KathleenRehl.com and Amazon