Kathleen M. Rehl, Ph.D., CFP®

Speaker • Author • Thought Leader

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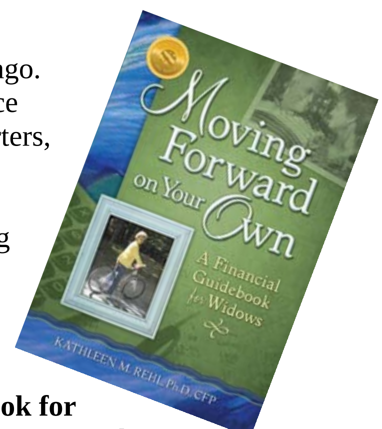
Enlighten Your Journey
www.kathleenrehl.com

What others are saying about Kathleen . . .

> ***"Kathleen, thanks again for the presentation you did for our Professional Advisory Committee. One of our longest-term members said this was the best session he ever attended! Your passion for helping widows shows in your speaking and your book."***
>
> Beverley McLain
> VP, Philanthropic Services
> Community Foundation of Tampa Bay

Dr. Rehl is a leading authority on the subject of widows and financial planning. She is frequently invited to give presentations across the country on this topic—both to women's groups and to professionals who assist widows. She has appeared on national television. Kathleen also speaks about charitable and legacy planning in addition to other special topics.



She is an educator at heart, stemming from her prior work as a university professor years ago. These days her "classrooms" have expanded far beyond college walls to include conference centers, women's circles, professional meeting facilities, non-profit organization headquarters, internet webinars and podcasts, congregations, and more.

From her personal grief experiences as a widow, Kathleen's life purpose evolved—helping other widows to feel more secure, enlightened and empowered about their financial matters. She is passionate about helping her "widowed sisters" to take control of their financial future.

Kathleen was motivated to write **Moving Forward on Your Own: A Financial Guidebook for Widows** after her husband's death. She and her book have been featured in almost three dozen popular magazines, newspapers and professional journals. These include *The New York Times, Wall Street Journal, Kiplinger's, AARP Bulletin, U.S. News & World Report, Consumer Report*s, *Investment News*, and many others. The guidebook has received 7 national awards.

Kathleen and her staff have provided comprehensive, life-centered financial planning for clients since 1996. She was previously named as one of the country's 100 Great Financial Planners by *Mutual Funds* magazine. To devote more time to writing and speaking activities, Kathleen closed her practice to new clients some time ago.

More About Kathleen

Education and Credentials:

- Certified Financial Planner Board of Standards license #055348, September 1995
- Ph.D. (Education) - University of Illinois at Urbana-Champaign, October 1976

Published Books:

- *Moving Forward on Your Own: A Financial Guidebook for Widows,* Rehl Financial Advisors, August 2010
- *Planning for the Times of Your Life: 45 Great Financial Planning Ideas,* Cambridge Advisors, LLC, 1999

In the News:

- *Bottom Line Personal,* "After a Spouse Dies…Important Financial Steps to Take Right Away," January 2012
- *The New York Times,* "Footsteps to Follow in the Coming Year," December 2011
- *Marotta on Money,* "Helping widows move forward on their own," December 2011
- *Investment News,* "What Worries Advisers as we Enter 2012," November 2011
- *The Vanguard Group,* "A Widow's Guide to Financial Decisions," October 2011
- *Dow Jones Newswires Column,* "Listening First is Key with Widows." October 2011
- *Investment News,* "Patience is Key When Working with Widows," October 2011
- *Senior Market Advisor,* "Estate Planning for Senior Women," October 2011
- *St. Petersburg Times,* "Financial Planner's Own Experience Helps Her Guide Widows in Money Matters," September 2011
- *The Wall Street Journal,* "Alone and Confused," September 2011
- *Investment News,* "A Passion for Working with Widows,' September 2011
- *The New York Times,* "For the Recently Widowed, Some Big Financial Pitfalls to Avoid," September 2011
- *Kiplinger Retirement Report,* "A To-Do List for the Surviving Spouse," September 2011
- *Squared Away Blog,* "Widowed Advisor Strives to Help Others," August 2011
- *NAPFA Advisor,* "Affairs of Estate (The Rehl Approach)," July 2011
- *Senior Market Advisor,* "Estate Planning," July 2011
- *AARP Bulletin,* "Marriage and Money," June 2011
- *Consumer Reports Money Adviser,* "Make Estate Planning a Family Affair," April 2011
- *The New York Times,* "Money Through the Ages: Pondering Risks in Retirement," March 24, 2011
- *Kiplinger's Retirement Report,* "Information to Act On," March 2011
- *ACA Financial Focus,* "Money-Smart Steps for Recent Widows," March 2011
- *NAPFA Advisor,* "The Write Stuff," February 2011
- *Caring Connections,* book review, January 2011
- *NAPFA Advisor,* "Financial Planning for Women," December 2010
- *Help Me Publish blog,* "Author Interview: Kathleen M. Rehl, Ph.D., CFP," December 27, 2010
- *The Wall Street Journal,* "Financial Planning for One is Easier Than Two – But Hardly Easy," December 13, 2010

Upcoming and Recent Speaking Engagements:

- Luther College 8th Annual Women, Faith & Finances conference, April 2012
- American Association of University Women, March 2012
- Church Women United Annual Retreat, March 2012
- Homekeepers, Christian Television Network, January 2012
- The Community Foundation of Tampa Bay, January 2012
- Purposeful Planning Institute, January 2012
- Florida Writers Association, December 2011
- Florida Bahamas Synod Women's Organization Fall Gathering, November 2011 (also several prior years)
- Thrivent Financial for Lutherans National Sales Meeting, November 2011
- Alliance of Cambridge Advisors Annual Conference, September 2011
- National Association of Personal Financial Advisors Annual Conference, June 2011
- Women of the ELCA Triennial National Gathering, July 2011
- Camp Widow National Event, August 2011 (also in 2009 and 2010)

Awards and Recognitions:

- *Moving Forward on Your Own: A Financial Guidebook for Widows* has received 7 national book awards—Readers Favorite Gold Book Award (grief), USA Best Books Award (women's issues), Next Generation Indie Book Award (women's issues), Living Now Bronze Book Award (finance/budgeting); also a ForeWord Book of the Year Finalist (women's issues), Readers Favorite Book Award Finalist (business/finance), and USA Best Books Awards Finalist (business: personal finance)
- 2001 Included in the 100 Great Financial Planners listing by *Mutual Funds Magazine*

Professional History:

- 1996-current; Owner of Rehl Financial Advisors, author and speaker
- 1983-1995; Vice President for Development and Communication at Lutheran Social Services of Central Ohio after Director of Planned Giving at the National Foundation for Chiropractic Education and Research in Arlington, VA
- 1976-1982; Tenured Assistant Professor of Education at Hood College, Frederick, MD following similar position at the University of Nebraska-Lincoln