



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

Happily “reFired” legacy storyteller & nonprofit ambassador

Author: [Moving Forward on Your Own: A Financial Guidebook for Widows](#)

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Selected Articles & More

Date	Published By	Title & Link	Author
#188			
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 ALSO see intro video here	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	CNBC	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
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



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3/16/2021	<i>YouTube</i>	Next Gen Mentoring Forum interview focused on practical aspects of working with widows	CA Lutheran University Financial Planning
2/17/2021	<i>Sixty & Me</i>	Try Something New: Write a Poem and Stretch Your Brain	Kathleen Rehl
2/12/2021	<i>Humble Dollar</i>	Final Thoughts	Kathleen Rehl
2/3/2021	<i>AgeBuzz</i>	Shake Up Your Brain a Bit: Get Outside Your Comfort Zone	Kathleen Rehl
11/27/2020	<i>Sixty & Me</i>	Put Your Gratitude into Action—Not Only for the Holidays!	Kathleen Rehl
11/4/2020	<i>AgeBuzz</i>	How I Learned to Never Say Never	Kathleen Rehl
10/1/2020	<i>Journal of Financial Planning</i>	Self-empowerment among widows: A financial planning perspective	Laura Mattia John E. Grable Carrie L. West, Linda Y. Leitz Kathleen Rehl
9/9/2020	<i>Sixty & Me</i>	What I Learned from my Grandmother, the Entrepreneur	Kathleen Rehl
8/5/2020	<i>AgeBuzz</i>	The Joy of Writing Poetry Now!	Kathleen Rehl
5/1/2020	<i>Book</i>	Storied Tables of Caffe Lena: Preserving the Story & Spirit of a Legendary Venue	Kathleen Rehl Charlie Pickett
4/7/2020	<i>AgeBuzz</i>	Write Your Personal Legacy Letter for Family & Friends	Kathleen Rehl
3/2020	<i>Sixty & Me</i>	How to Create and Share Your Lasting Legacy of Love	Kathleen Rehl
3/22/2020	<i>CNBC</i>	Widows can lead a rewarding life after grief and growth stages	Kathleen Rehl
3/13/2020	<i>CNBC</i>	After initial grief, new widows must reexamine their finances	Kathleen Rehl
3/6/2020	<i>CNBC</i>	Recent widows need financial guidance after a spouse's death	Kathleen Rehl
10/27/2019	<i>Sixty & Me</i>	Choose Retirement Rather Than Vintage Retirement! These 7 Questions Will Help You Find Your Direction	Kathleen Rehl
10/23/2019	<i>AgeBuzz</i>	Girlfriends Getaway	Kathleen Rehl
08/09/2019	<i>Forbes</i>	How Widows Can Better Manage Their Money	John Wasik
07/30/2019	<i>Investment News</i>	Retirement Repair Shop with Mary Beth Franklin – Episode Seven	Mary Beth Franklin
07/16/2019	<i>AgeBuzz</i>	After The Hearse, Don't Be A Purse Or A Nurse!	Kathleen Rehl
07/11/2019	<i>Sixty & Me</i>	6 Know-It-All Statements New Widows Don't Want to Hear (And Alternatives That Are Actually Helpful)	Kathleen Rehl



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06/27/2019	<i>Center for Retirement Research at Boston College</i>	Widows: Manage Your Grief, Finances	Squared Away Blog
05/23/2019	<i>Investment News</i>	Dealing with widows requires empathy and patience	Mary Beth Franklin
05/15/2019	<i>Reuters</i>	Depression risk could derail your retirement portfolio	Beth Pinsker
05/01/2019	<i>AgeBuzz</i>	Dollar For Dollar: Determining Your Financial Strategy As A New Widow	Connie Zuckerman
04/13/2019	<i>The Bulletin</i>	How grieving widowed spouses can cope with financial matters	Susan B. Garland
04/11/2019	<i>The New York Times</i>	You're a Widow. Now What?	Susan B. Garland
04/01/2019	<i>Living Lutheran</i>	Couple Shines Their Light	Erin Strybis
03/29/2019	<i>The Wall Street Journal</i>	Estate Planning for the Uninitiated	Anne Tergesen
03/28/2019	<i>Humble Dollar</i>	Better Than Golf	Kathleen Rehl
03/01/2019	<i>New York Times</i>	You're the 'Money Person' in Your Relationship? That's Problematic	Elizabeth Harris
02/20/2019	<i>Think Advisor</i>	The 3 Stages of Widowhood, and How Advisors Can Help	Jane Wollman Rusoff
02/14/2019	<i>Next Avenue</i>	Next Avenue Readers On What Love Looks Like	Kathleen Rehl
01/08/2019	<i>Nerd's Eye View</i>	#FASuccess Ep 106: Empowering Widows Financially By Helping Them Navigate The 3 Stages of Widowhood	Michael Kitces Kathleen Rehl
12/21/2018	<i>Sixty & Me</i>	Don't Make New Year's Resolutions: Mature Women Enjoy This Alternative	Kathleen Rehl
12/01/2018	<i>Insurance News Net Magazine</i>	After The Funeral: Navigating The Three Stages of Widowhood	Kathleen Rehl
11/17/2018	<i>New York Times</i>	Women Who Become Widows Are Faring Better Financially	Tammy LaGorce
11/15/2018	<i>Time</i>	The One Thing Married Women Should do to Protect Their Finances Before They Retire	Ryan Drousseau
11/05/2018	<i>Humble Dollar</i>	Merging Money	Kathleen Rehl



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11/01/2018	<i>Sixty & Me</i>	Marriage After 60: I Love Two Men, With the Blessings of Both	Kathleen Rehl
08/13/2018	<i>Sixty & Me</i>	How a Getaway With Girlfriends Can Enhance Your Friendships in Retirement	Kathleen Rehl
06/20/2018	<i>Kbkweathh connection</i>	Do You Want to be Hired or Fired by the New Widow	Kathleen Rehl
5/10/2018	<i>Sixty & Me</i>	What Money Personality Type Are You? Spender, Idealist, Star, Avoider Or Something Else?	Kathleen Rehl
02/09/2018	<i>Sixty & Me</i>	Never Say “Never” When It Comes To Finding Love After A Loss	Kathleen Rehl
02/05/2018	<i>Sixty & Me</i>	New Guidebook For Widows Offers Hope, Financial Wisdom and a Positive Path Forward	Margaret Manning
02/01/2018	<i>Financial Adviser News</i>	How Advisors Can Tailor Their Services For Widows	Karen Demasters
01/19/2018	<i>USA Today</i>	How to prepare financially for being a widow/widower	Robert Powell
12/02/2017	<i>Journal of Financial Planning</i>	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	<i>Sixty & Me</i>	After 50 Dating: 10 Financial Questions To Ask Your Partner Before Committing	Kathleen Rehl
08/25/2017	<i>NAPFA Advisor Magazine</i>	10 Questions To Ask Your Widowed Clients Who Re-partner	Kathleen Rehl
08/21/2017	<i>Sixty & Me</i>	Why Are Mature Women Living With Their Partners Rather Than Marrying?	Kathleen Rehl
07/03/2017	<i>Sixty & Me</i>	Are We Too Old For Boyfriends In Our 60s?	Kathleen Rehl
06/07/2017	<i>Seeking Alpha</i>	5 Financial Planning Tips For Working With Recent Widows	Jack Waymire
05/01/2017	<i>Journal of Financial Service Professionals Vol. 71, No. 3</i>	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-



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			Hernandez Susan Bradley Pedro Silva
03/18/2017	<i>Financial Advisor IQ</i>	Have a Client in Crisis? Take It Slow and Easy	
03/10/2017	<i>Advisor Connect: Financial Insights & Growth Strategies</i>	Will You Be Hired or Fired by the New Widow?	Kathleen Rehl
02/08/2017	<i>FINRA: The Alert Investor</i>	Managing Money Through Grief: 10 Tips for Widows and Widowers	Alice Gomstyn
01/13/2017	<i>Sixty & Me</i>	Financial Advice For Widows: 9 Steps To Help You Get Control And Move Forward	Kathleen Rehl
12/20/2016	<i>Sixty & Me</i>	Give Yourself a Legacy Gift By Repurposing Meaningful Jewelry	Kathleen Rehl
11/4/2016	<i>Sixty & Me</i>	Financial Advice for Widows: What To Do Before You Remarry	Kathleen Rehl
10/17/2016	<i>Reader's digest</i>	10 Things You Should Never Say to a Widow	Deborah Weiss
10/04/2016	<i>Sixty & Me</i>	Love Is Eternal, But, Life Isn't! Facing the Chance of Becoming a Widow	Kathleen Rehl
09/14/2016	<i>Sixty & Me</i>	5 Big Mistakes that Widows Make and How to Avoid Them	Kathleen Rehl
08/17/2016	<i>CNBC</i>	Suddenly single: The realities of going from two to one	Ilana Polyak
06/20/2016	<i>Next Avenue</i>	I Planned for Life as a Widow, But Got a Lot Wrong	Ellen Uzelac
04/29/2016	<i>Tampa Bay Times</i>	Why are more Baby Boomers who can afford to buy a home renting instead?	Susan Taylor Martin
04/23/2016	<i>Sentinel Online</i>	Expert offers story, advice on widowhood	Judy Bryan
01/13/2016	<i>CBS & Fox News: KEYC Mankato</i>	Preparing Women For Financial Life After The Death Of Their Spouse	Shawn Logging
01/05/2016	<i>Journal of Financial Service Professionals Vol. 70, No. 1 pp.53-60</i>	Widows' Voices: The Value of Financial Planning	Kathleen Rehl Carolyn Moor Linda Leitz John Grable
10/28/2015	<i>Financial Planning</i>	Ensuring Success When Switching to a Flat Retainer Fee Model	Carolyn McClanahan
10/05/2015	<i>Financial Advisor IQ</i>	Keeping Widows from Leaving Calls for a Delicate Dance	R.A. Monroe
9/28/2015	<i>Investment Advisor</i>	Marketing Tips of the Trade	Olivia Mellan



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08/10/2015	<i>Bankrate.com</i>	A guide for widows on how to manage money	Julie Landry Laviolette
07/27/2015	<i>Susan's Women's Writing Circle blog</i>	A Widow's Memoir Moment	Kathleen Rehl
07/20/2015	<i>The Chautauquan Daily</i>	Rehl to advise widows about financial transition	Deborah Trefts
07/18/2015	<i>New Haven Register</i>	DOLLARS & SENSE: A little support goes a long way	John Fitts
05/15/2015	<i>Investment News</i>	How to Talk to Clients Who Have Just Been Widowed	Kathleen Rehl
04/03/2015	<i>Sudden Money Institute - SMI Blog</i>	Sharing Your Story, Values, Wealth, and Aspirations for Future Generations	Kathleen Rehl
03/24/2015	<i>Sudden Money Institute - SMI Blog</i>	On Hosting Events for Widows	Kathleen Rehl
12/01/2014	<i>Broker World Magazine</i>	How to Help Your Widowed Clients Make Wise Decisions with Life Insurance Benefits	Kathleen Rehl
11/05/2014	<i>JournalTimes.com</i>	Retirement Income for Surviving Spouses	Justus Morgan
10/27/2014	<i>Sudden Money Institute - SMI Blog</i>	A Tool To Use With Your Widowed Clients	Kathleen Rehl
10/01/2014	<i>ACP Financial Focus</i>	Recommendations for Recent Widows	Kathleen Rehl
10/01/2014	<i>Broker World</i>	Three Tips on What to Say to Your Widowed Client	Kathleen Rehl
10/10/ 2014	<i>Wall Street Journal</i>	Wealth Adviser: Are You Guilty of 'Due-Diligence Lite' on Funds?	Kevin Noblet
09/09/2014	<i>Wall Street Journal</i>	A 'Financial Retreat' for a Widow	Austin Kilham
08/17/2014	<i>Investment News</i>	Advising Women Through Transitions	Staff
08/03/2014	<i>The Chautauquan Daily</i>	Rehl to Advise Widows On Emotional And Financial Transitions	Deborah Trefts
07/23/2014	<i>Investment News</i>	Advisers Need to be Nurturers When Helping a Woman Through Life Changes	Alessandra Malito
07/10/2014	<i>CNBC</i>	Widows: Don't Let Grief Cloud Financial Judgment	Ilana Polyak
Summer 2014	<i>Woodbury Connection</i>	6 Tips for Working with New Widows	Kathleen Rehl
06/17/2014	<i>Blueleaf</i>	What to Say [and NOT Say] to a Grieving Widowed Client	Kathleen Rehl



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05/30/2014	<i>Miami Herald</i>	When Husband Dies, Widows Must Deal with Grief And Finances	Julie Landry Laviolette
05/12/2014	<i>Blueleaf</i>	Faced with This Unpredictable Client Moment, Pause and Don't Talk About the Market	Kathleen Rehl
04/28/2104	<i>Research Magazine</i>	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)	<i>Investment Advisor</i>	Working with Widows ~&~ Learning More About Working with Widows	Olivia Mellan
02/07/2014	<i>Citizen-Times.com</i>	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	<i>MoneyNews.com</i>	Senior Scams Hit Victims with \$2.9 Billion in Annual Losses	Michelle Smith
01/12/2014	<i>Tampa Tribune</i>	Widowed Financial Planner Offers Workshop In Brandon	Barbara Routen
01/12/2014	<i>Tampa Tribune</i>	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	<i>Inside Information</i>	Planning In Widowhood	Bob Veres
12/01/2013	<i>Financial Planning magazine & web</i>	7 Financial Advisors With Great Side Gigs	Staff
11/01/2013	<i>Gather-national magazine of Women of the ELCA</i>	Advice for New Widows	Kathleen Rehl
10/01/2013	<i>Wall Street Journal</i>	Wealth Adviser: Helping Federal Employees Cinch the Belt Another Notch	



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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 Perspective	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
06/01/2012	ACP Financial Focus	“Magical Thinking” Isn’t a Plan	Kathleen Rehl
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



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01/15/2012	<i>Bottom Line Personal</i>	After a Spouse Dies... Important Financial Steps to Take Right Away	Kathleen Rehl
12/31/2011	<i>The New York Times</i>	Footsteps to Follow in the Coming Year	Ron Lieber
12/23/2011	<i>Marotta on Money</i>	Helping Widows Move Forward On Their Own	David John Marotta
11/25/2011	<i>Investment News</i>	What Worries Advisers As We Enter 2012	Fred Gabriel
10/17/2011	<i>The Vanguard Group</i>	A Widow's Guide To Financial Decisions	Staff
10/12/2011	<i>A Dow Jones Newswires Column</i>	Listening First is Key With Widows	Staff
10/11/2011	<i>Pocono Record</i>	5 Financial Rules for Grieving Spouses	Erin Baehr
10/02/2011	<i>Investment News</i>	Patience Is Key When Working With Widows	Jim Pavia
10/01/2011	<i>Senior Market Advisor</i>	Estate Planning for Senior Women	Staff
09/25/2011	<i>St. Petersburg Times</i>	Financial Planner's Own Experience Helps Her Guide Widows In Money Matters	Susan Taylor Martin
09/19/2011	<i>The Wall Street Journal</i>	Alone...and Confused	Veronica Dagher
09/04/2011	<i>Investment News</i>	A Passion for Working with Widows	Jeff Benjamin
09/03/2011	<i>The New York Times</i>	For the Recently Widowed, Some Big Financial Pitfalls to Avoid	Ron Lieber
08/29/2011	<i>Kiplinger's Retirement Report</i>	A To-Do List for the Surviving Spouse	Susan B. Garland
08/01/2011	<i>Squared Away Blog</i>	Widowed Advisor Strives to Help Others	Staff
07/01/2011	<i>NAPFA Advisor</i>	Affairs of Estate (The Rehl Approach)	Staff
07/01/2011	<i>Senior Market Advisor</i>	Estate Planning	Susan B. Garland
06/01/2011	<i>AARP Bulletin</i>	Marriage and Money	Jane Bryant Quinn
04/01/2011	<i>Consumer Reports Money Adviser</i>	Make Estate Planning a Family Affair	Staff
03/24/2011	<i>The New York Times</i>	Money Through the Ages: Pondering Risks in Retirement	Tara Siegel Bernard
03/01/2011	<i>Kiplinger's Retirement Report</i>	Information to Act On	Staff
03/01/2011	<i>ACP Financial Focus</i>	Money-Smart Steps for Recent Widows	Kathleen Rehl



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02/01/2011	<i>NAPFA Advisor</i>	The Write Stuff	Staff
01/01/2011	<i>Caring Connections</i>	Book Review	Staff
12/01/2010	<i>NAPFA Advisor</i>	Financial Planning for Women	Staff
12/27/2010	<i>Help Me Publish Blog</i>	Interview: Kathleen Rehl, Ph.D., CFP	Tamara Dever
12/13/2010	<i>The Wall Street Journal</i>	Financial Planning for One Is Easier Than Two – But Hardly Easy	Veronica Dagher
09/01/2010	<i>Tapestry</i>	Steps for Recent Widows	Kathleen Rehl
09/01/2010	<i>U.S. News & World Report – The Best Life Blog</i>	Advice for Widows and Older Couples, Too	Philip Moeller
06/01/2010	<i>Dow Jones Investment Advisor Blog</i>	Kathleen Rehl, On Working with Widows	Staff
06/01/2009	<i>Investment News</i>	Widows' Needs Being Ignored By Advisors	Lisa Shidler
02/01/2008	<i>Investment News</i>	Making a New Widow's Life Easier	Kathleen Rehl