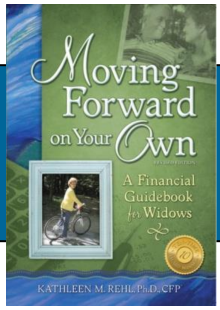
Kathleen M. Rehl, Ph.D., CFP®, CeFT® Emeritus

Happily "ReFired" Author, Nonprofit Ambassador & Legacy Storyteller

https://KathleenRehl.com



Resumé

Story of Origin from My Heart

As of 5/18/2022

Once upon a time in a faraway land called Wisconsin, a baby girl was born in midst of 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 short
Receiving valedictorian scholarship
Being 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 tenue
Changing abruptly, pivoting
Leaving ivory-tower colleagues.
"How could you go?"

New challenges at nonprofits
Urging folks to open 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
Centering on five "F" words:
Family, **F**un, **F**ocused-purpose,
Friends, and **F**itness (body, mind, spirit, & money)
Creating as legacy writer and nonprofit ambassador.
Fantastic Chapter!

Keep reading next page . . .

Short Bio

ABOUT KATHLEEN M. REHL, PH.D., CFP®, CeFT® Emeritus

As a zesty Boomer, Kathleen is gratefully giving and growing . . . using her skills and experience to encourage others to also live their best life. She wrote the multi-award-winning book, *Moving Forward on Your Own: A Financial Guidebook for Widows* after the death of her late husband. (About 80,000 copies are in circulation now.) Kathleen owned Rehl Financial Advisors for almost 18 years before retiring to a six-year encore career of empowering widows and their advisors through her speaking, writing, and research. She made over 300 presentations across the country and virtually.

Kathleen's work has been featured in many professional, academic, and popular publications including the *New York Times, Wall Street Journal, Kiplinger's, CNBC, and USA Today*. Since "reFiring" in 2020, she continues to speak at selected conferences and life-long learning centers. As a nonprofit ambassador, she helps charitable organizations grow their endowments. Kathleen still pens pieces about widows and money while also writing legacy stories, poems, and letters. Her website is at https://KathleenRehl.com.

75 years
Gratefully
Giving & Growing

Education and Credentials

- Certified Financial Transitionist®, Sudden Money Institute, January 2015
- Certified Financial Planner™ Board of Standards license #055348, September 1995
- Ph.D., Education - the University of Illinois at Urbana-Champaign, October 1976

Publications

- Many professional, academic, and popular publications; go to https://KathleenRehl.com for a list of 175+ articles by or about Kathleen
- *Storied Tables of Caffè Lena: Preserving the Story & Spirit of a Legendary Venue*, (eBooklet) 2020
- *LEGACY LIFEPRINT™: Sharing Your Story, Values, Wealth, and Aspirations for Future Generations* (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

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

Professional History

- 2020-current—"ReFired"
- 2014-2019—Empowering Widows Financially™ at Rehl WEALTH Collaborations LLC
- 1995-2013—Owner of Rehl Financial Advisors—Certified Financial Planner™
- 1976-1995—Tenured Assistant Professor at Hood College, Frederick, MD after a similar position at the University of Nebraska-Lincoln; VP at Lutheran Social Services of Central Ohio; Director of Gift Planning at the National Foundation for Chiropractic Education and Research
- 1971-1975—Public school teacher and community college instructor, Madison, WI, and Champaign, IL