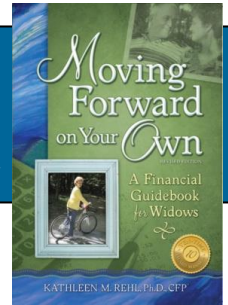




Kathleen M. Rehl, Ph.D., CFP®, CeFT® Emeritus

Storyteller Inspiring Legacy and Longevity Planning | Empowering Widows Financially



<https://KathleenRehl.com>

KathleenRehl@gmail.com

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

Centering on five "F" words:

Family, Fun, Focused-purpose,

Friends and Fitness (body, mind, spirit, & money)

Creating as a legacy writer and nonprofit advocate.

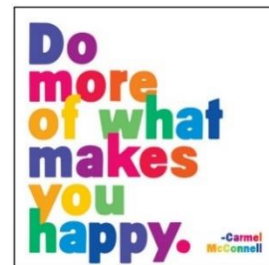
Fantastic Chapter!



Please continue reading next page . . .

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

Kathleen owned Rehl Financial Advisors for 18 years before retiring to an active six-year encore career empowering widows through her speaking, writing, and research. As a financial planner, she specialized in working with widows and philanthropic planning. After her husband died, Kathleen wrote [Moving Forward on Your Own: A Financial Guidebook for Widows](#). Now in her 78th year, she's happily "reFired." That's not traditional retirement, as she inspires legacy and longevity planning while continuing to assist widows. Recently returning to her love of teaching, she's Adjunct Faculty at The American College of Financial Services, in their Chartered Advisor in Philanthropy® program. Years ago, Kathleen served as a gift planning officer and, before that, a university professor. Her work has been featured in the *New York Times*, *Wall Street Journal*, *Next Avenue*, *Kiplinger's*, *CNBC*, *Humble Dollar*, *Sixty & Me*, *AgeBuzz*, *Rethinking65*, and others. As a zesty Boomer practicing positive aging, Kathleen gratefully continues to create and contribute . . . joyfully using her skills and experiences to encourage others to live their best lives.



Education and Credentials

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

Publications

- Many professional, academic, and popular publications; [go here](#) for a list of 200+ articles by or about Kathleen
- [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 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 | • Citizen-Times.com | • Inside Information | • NAPFA Advisor Magazine | • Tampa Bay Times |
| • ACP Financial Focus | • CNBC | • Investment Advisor | • Next Avenue | • ThinkAdvisor |
| • Advisor One | • Financial Advisor IQ | • Investment News | • New York Times | • US News & World Report |
| • Advisor Perspective | • Financial Planning Magazine | • Journal of Financial Service Professionals | • OnWallStreet.com | • US Army SOS Newsletter |
| • AgeBuzz | • Financial Focus | • Kiplinger's Retirement Report | • Reader's digest | • USA Today |
| • Blueleaf | • FINRA | • Miami Herald | • Research Magazine | • Vanguard Group |
| • Bottom Line Personal | • Florida Today | • MoneyNews.com | • Rethink65ing | • Wall Street Journal |
| • Broker World | • Gather | • Mountain Express | • Reuters | |
| • CBS & Fox News | • Humble Dollar | | • Sixty & Me | |
| • Chautauquan Daily | | | | |

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
- 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

