

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



Author, Educator, Mentor, Storyteller

● Empowering Widows Financially ● Inspiring Legacy and Longevity Planning

<https://www.KathleenRehl.com>

[KathleenRehl@gmail.com](mailto:KathleenRehl@gmail.com)



**Empowering  
Widows  
Financially™**

## Articles & More About Kathleen Rehl's Work

219 Stories			
Date	Published By	Title & Link (older links may be expired)	Author
1/17/2024	MarketWatch & Morningstar	<a href="#">When A Spouse Dies, There Can Be A 'Tax Explosion' For The One Left Behind</a> <b>Morningstar Link:</b>	Beth Pinsker
1/14/2025	Rethinking65	<a href="#">What Empowering Widows Really Requires: How to Guide Grieving Clients Through This Personal and Financial Transition with Compassion and Care.</a>	Kathleen Rehl
12/24/2024	Sixty & Me	<a href="#">Approaching 78 – Thriving with My Five 'F' Words</a>	Kathleen Rehl
11/28/2024	Open to Hope	<a href="#">Moving Forward on Your Own: Empowering Widows</a> (podcast)	Open to Hope Foundation
11/27/2024	Nerd's Eye View	<a href="#">Enhancing Client Conversations About Charitable Giving: Sample Questions, Scripts, And Tools For Better Engagement</a>	Kathleen Rehl
11/13/2024	Agebuzz	<a href="#">Training As An End-Of-Life Doula, A Profound Experience</a>	Kathleen Rehl
11/6/2024	Sixty & Me	<a href="#">Celebrating 3 Years Wine-Free: Choosing Health As I Age</a>	Kathleen Rehl
9/11/2024	Agebuzz	<a href="#">Why I Want to Become an End-of-Life Doula</a>	Kathleen Rehl
7/27/2024	Sixty & Me	<a href="#">I'm Aging But Not Growing Old</a>	Kathleen Rehl
7/23/2024	Rethinking65	<a href="#">When the Unthinkable Happens</a>	Kathleen Rehl
7/2024	The Apple Tree Third Age Press	<a href="#">Stage 4</a> poem	Kathleen Rehl
6/19/2024	Agebuzz	<a href="#">Draft Your Legacy Letter in 15 Minutes With 5 Easy Steps</a>	Kathleen Rehl
5/30/2024	Sixty & Me	<a href="#">3 Secrets of Resilient Widows: Embrace Life on Your Own Terms</a>	Kathleen Rehl
4/20/24	Open to Hope	<a href="#">Handling Your Own End-Of-Life Planning: A Thoughtful Goodbye</a>	Kathleen Rehl
3/27/2024	Agebuzz	<a href="#">Elephant in the Room</a> poem	Kathleen Rehl
3/26/2024	Humble Dollar	<a href="#">Not Wired to Retire</a>	Kathleen Rehl
3/20/2024	Sixty & Me	<a href="#">My Husband Told Me to Find Another Partner ... And To Watch Out For My Money</a>	Kathleen Rehl
2/6/2022	Agebuzz	<a href="#">Embracing My 77th Birthday and Moving Forward</a>	Kathleen Rehl
1/31/2024	Nerd's Eye View	<a href="#">Using A Testamentary Charitable Remainder Unitrust (T-CRUT) To Give Twice to Both Loved Ones and Charitable Organizations</a>	Kathleen Rehl
1/15/2024	Rethinking65	<a href="#">Will New Widows Fire or Hire You?</a>	Kathleen Rehl
10/31/2023	Morningstar	<a href="#">A New Way to Achieve Charitable Goals While Saving on Taxes</a>	Kathleen Rehl
10/15/2023	Sixty & Me	<a href="#">Widows Rock! Thriving in Stage 3 of Widowhood</a>	Kathleen Rehl
10/11/2023	Agebuzz	<a href="#">Navigating the Future: Our Checklist for Choosing a Continuing Care Retirement Community</a>	Kathleen Rehl
9/23/2023	Sixty & Me	<a href="#">Navigating Financial Realities After Losing Your Spouse</a>	Kathleen Rehl
8/23/2023	Nerd's Eye View	<a href="#">Legacy IRA™ Rollover To A Charitable Gift Annuity: Using This New Tax-Advantaged Opportunity To Help Clients Achieve Charitable And Retirement Goals</a>	Kathleen Rehl

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



Author, Educator, Mentor, Storyteller

● Empowering Widows Financially ● Inspiring Legacy and Longevity Planning

<https://www.KathleenRehl.com>

[KathleenRehl@gmail.com](mailto:KathleenRehl@gmail.com)



## Articles & More About Kathleen Rehl's Work

219 Stories			
Date	Published By	Title & Link (older links may be expired)	Author
8/17/2023	<i>Sixty &amp; Me</i>	<a href="#">After Heartbreak, New Widows Must Revisit Their Finances</a>	Kathleen Rehl
6/7/2023	<i>Agebuzz</i>	<a href="#">Waiting List</a>	Kathleen Rehl
5/18/2023	<i>Sixty &amp; Me</i>	<a href="#">Confronting the Elephant in the Room: The Importance of Your Estate, Legacy and End-of-Life Planning</a>	Kathleen Rehl
2/11/2023	<i>Humble Dollar</i>	<a href="#">Better Than Cake</a>	Kathleen Rehl
2/15/2023	<i>Agebuzz</i>	<a href="#">Love Lasts Forever</a>	Kathleen Rehl
1/26/2023	<i>Next Avenue</i>	<a href="#">I Helped My Mother to Live and Later Die</a>	Kathleen Rehl
1/4/2023	<i>Agebuzz</i>	<a href="#">Better Than a New Year's Resolution—Set Your Big Grin Goal for 2023</a>	Kathleen Rehl
1/3/2023	<i>Sixty &amp; Me</i>	<a href="#">I Celebrated One Year Wine-Free</a>	Kathleen Rehl
10/2/2022	<i>YouTube</i>	Recording of <a href="#">What to Do Before You Kick the Bucket: Effective Estate &amp; Legacy Planning</a>	Attorney Andrew Ward & Kathleen Rehl
9/21/2022	<i>Agebuzz</i>	<a href="#">What to Do Before You Kick the Bucket</a>	Kathleen Rehl
9/10/2022	<i>Humble Dollar</i>	<a href="#">All Together Now</a>	Kathleen Rehl
9/2/2022	<i>CNBC</i>	<a href="#">Divorced, Widowed Women Are Most At Risk of Retiring Earlier Than Expected</a>	Sarah O'Brien
8/2/2022	<i>Purposeful Planning Institute</i>	<a href="#">I'm Giving Twice with a T-CRUT</a> (recorded webinar)	Kathleen Rehl John A. Warnick
7/20/2022	<i>FSP Journal Live</i>	<a href="#">Widows &amp; Research</a> podcast	Kathleen Rehl John Grable
7/1/2022	<i>Journal of Financial Service Professionals</i> Vol. 76, No. 4	<a href="#">Financial Satisfaction Postwidowhood: The Role of Resilience</a>	John E. Grable Laura Mattia Carrie L. West, Linda Y. Leitz Kathleen Rehl
6/22/2022	<i>Agebuzz</i>	<a href="#">Focus on Investment Factors You Can Control</a>	Kathleen Rehl
6/17/2022	<i>Mindful Money</i>	<a href="#">Financial Advice for Widows &amp; Enjoying ReFirement</a>	Jonathan DeYoe Kathleen Rehl
6/8/2022	<i>Sixty &amp; Me</i>	<a href="#">Jane Fonda and I Happily Agree About Drinking After 60</a>	Kathleen Rehl
5/26/2022	<i>CNBC</i>	<a href="#">Here Are The First Financial Steps to Make After Losing a Spouse</a>	Annie Nova
5/17/2022	<i>Humble Dollar</i>	<a href="#">Better Than Dollars</a>	Kathleen Rehl
3/23/2022	<i>Agebuzz</i>	<a href="#">The Joy of Reading Picture Books Virtually with My Long-Distance Grandchild</a>	Kathleen Rehl
2/9/2022	<i>Agebuzz</i>	<a href="#">You Are Wealthier Than You Think</a>	Kathleen Rehl

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



Author, Educator, Mentor, Storyteller

● Empowering Widows Financially ● Inspiring Legacy and Longevity Planning

<https://www.KathleenRehl.com>

[KathleenRehl@gmail.com](mailto:KathleenRehl@gmail.com)



## Articles & More About Kathleen Rehl's Work

219 Stories			
Date	Published By	Title & Link (older links may be expired)	Author
1/31/2022	<i>Sixty &amp; Me</i>	<a href="#">Thoughts After My 75<sup>th</sup> Birthday!</a>	Kathleen Rehl
11/17/2021	<i>Agebuzz</i>	<a href="#">I'm "Giving It Twice," Helping My Son &amp; Leaving a Lasting Legacy</a>	Kathleen Rehl
10/11/2021	<i>Sixty &amp; Me</i>	<a href="#">Two Ways I Found Later Life Love</a>	Kathleen Rehl
9/22/2021	<i>Humble Dollar</i>	<a href="#">"Giving Twice"</a>	Kathleen Rehl
7/14/2021	<i>Agebuzz</i>	<a href="#">Pennies from Heaven: Gifts from My Guardian Angel</a>	Kathleen Rehl
7/5/2021	<i>ThinkAdvisor</i>	<a href="#">How to Help Widows Avoid Financial Risks of Remarriage</a>	Jane Wollman Rusoff
7/4/2021	<i>Sixty &amp; Me</i>	<a href="#">5 Easy Steps to Write a Legacy Letter for Family and Friends</a>	Kathleen Rehl
6/14/2021	<i>Sixty &amp; Me</i>	<a href="#">How We Hosted Camp Grandma &amp; Grandpa" During the Pandemic</a>	Kathleen Rehl
6/2/2021	<i>Agebuzz</i>	<a href="#">I Remember Growing Up in a Four-Generation Household</a>	Kathleen Rehl
5/4/2021	<i>Sixty &amp; Me</i>	<a href="#">Does Your Mother's Legacy Shape Your Own?</a>	Kathleen Rehl
3/16/2021	<i>YouTube</i>	<a href="#">Next Gen Mentoring Forum interview focused on practical aspects of working with widows</a>	CA Lutheran University Financial Planning
2/17/2021	<i>Sixty &amp; Me</i>	<a href="#">Try Something New: Write a Poem and Stretch Your Brain</a>	Kathleen Rehl
2/12/2021	<i>Humble Dollar</i>	<a href="#">Final Thoughts</a>	Kathleen Rehl
2/3/2021	<i>Agebuzz</i>	<a href="#">Shake Up Your Brain a Bit: Get Outside Your Comfort Zone</a>	Kathleen Rehl
11/27/2020	<i>Sixty &amp; Me</i>	<a href="#">Put Your Gratitude into Action—Not Only for the Holidays!</a>	Kathleen Rehl
11/4/2020	<i>Agebuzz</i>	<a href="#">How I Learned to Never Say Never</a>	Kathleen Rehl
10/1/2020	<i>Journal of Financial Planning</i>	<a href="#">Self-empowerment among widows: A financial planning perspective</a>	Laura Mattia John E. Grable Carrie L. West, Linda Y. Leitz Kathleen Rehl
9/9/2020	<i>Sixty &amp; Me</i>	<a href="#">What I Learned from my Grandmother, the Entrepreneur</a>	Kathleen Rehl
8/5/2020	<i>Agebuzz</i>	<a href="#">The Joy of Writing Poetry Now!</a>	Kathleen Rehl
5/1/2020	<i>Book</i>	<a href="#">Storied Tables of Caffe Lena: Preserving the Story &amp; Spirit of a Legendary Venue</a>	Kathleen Rehl Charlie Pickett
4/7/2020	<i>Agebuzz</i>	<a href="#">Write Your Personal Legacy Letter for Family &amp; Friends</a>	Kathleen Rehl
3//2020	<i>Sixty &amp; Me</i>	<a href="#">How to Create and Share Your Lasting Legacy of Love</a>	Kathleen Rehl
3/22/2020	<i>CNBC</i>	<a href="#">Widows can lead a rewarding life after grief and growth stages</a>	Kathleen Rehl
3/13/2020	<i>CNBC</i>	<a href="#">After initial grief, new widows must reexamine their finances</a>	Kathleen Rehl
3/6/2020	<i>CNBC</i>	<a href="#">Recent widows need financial guidance after a spouse's death</a>	Kathleen Rehl
10/27/2019	<i>Sixty &amp; Me</i>	<a href="#">Choose Refirement Rather Than Vintage Retirement! These 7 Questions Will Help You Find Your Direction</a>	Kathleen Rehl
10/23/2019	<i>Agebuzz</i>	<a href="#">Girlfriends Getaway</a>	Kathleen Rehl

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



Author, Educator, Mentor, Storyteller

● Empowering Widows Financially ● Inspiring Legacy and Longevity Planning

<https://www.KathleenRehl.com>

[KathleenRehl@gmail.com](mailto:KathleenRehl@gmail.com)



**Empowering  
Widows  
Financially™**

## Articles & More About Kathleen Rehl's Work

219 Stories			
Date	Published By	Title & Link (older links may be expired)	Author
08/09/2019	Forbes	<a href="#">How Widows Can Better Manage Their Money</a>	John Wasik
07/30/2019	Investment News	<a href="#">Retirement Repair Shop with Mary Beth Franklin – Episode Seven</a>	Mary Beth Franklin
07/16/2019	Agebuzz	<a href="#">After The Hearse, Don't Be A Purse Or A Nurse!</a>	Kathleen Rehl
07/11/2019	Sixty & Me	<a href="#">6 Know-It-All Statements New Widows Don't Want to Hear (And Alternatives That Are Actually Helpful)</a>	Kathleen Rehl
06/27/2019	Center for Retirement Research at Boston College	<a href="#">Widows: Manage Your Grief, Finances</a>	Squared Away Blog
05/23/2019	Investment News	<a href="#">Dealing with widows requires empathy and patience</a>	Mary Beth Franklin
05/15/2019	Reuters	<a href="#">Depression risk could derail your retirement portfolio</a>	Beth Pinsker
05/01/2019	Agebuzz	<a href="#">Dollar For Dollar: Determining Your Financial Strategy As A New Widow</a>	Connie Zuckerman
04/13/2019	The Bulletin	<a href="#">How grieving widowed spouses can cope with financial matters</a>	Susan B. Garland
04/11/2019	The New York Times	<a href="#">You're a Widow. Now What?</a>	Susan B. Garland
04/01/2019	Living Lutheran	<a href="#">Couple Shines Their Light</a>	Erin Strybis
03/29/2019	The Wall Street Journal	<a href="#">Estate Planning for the Uninitiated</a>	Anne Tergesen
03/28/2019	Humble Dollar	<a href="#">Better Than Golf</a>	Kathleen Rehl
03/01/2019	New York Times	<a href="#">You're the 'Money Person' in Your Relationship? That's Problematic</a>	Elizabeth Harris
02/20/2019	Think Advisor	<a href="#">The 3 Stages of Widowhood, and How Advisors Can Help</a>	Jane Wollman Rusoff
02/14/2019	Next Avenue	<a href="#">Next Avenue Readers On What Love Looks Like</a>	Kathleen Rehl
01/08/2019	Nerd's Eye View	<a href="#">#FASuccess Ep 106: Empowering Widows Financially By Helping Them Navigate The 3 Stages of Widowhood</a>	Michael Kitces Kathleen Rehl
12/21/2018	Sixty & Me	<a href="#">Don't Make New Year's Resolutions: Mature Women Enjoy This Alternative</a>	Kathleen Rehl

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



Author, Educator, Mentor, Storyteller

● Empowering Widows Financially ● Inspiring Legacy and Longevity Planning

<https://www.KathleenRehl.com>

[KathleenRehl@gmail.com](mailto:KathleenRehl@gmail.com)



**Empowering  
Widows  
Financially™**

## Articles & More About Kathleen Rehl's Work

219 Stories			
Date	Published By	Title & Link (older links may be expired)	Author
12/01/2018	<i>Insurance News Net Magazine</i>	<a href="#">After The Funeral: Navigating The Three Stages of Widowhood</a>	Kathleen Rehl
11/17/2018	<i>New York Times</i>	<a href="#">Women Who Become Widows Are Faring Better Financially</a>	Tammy LaGorce
11/15/2018	<i>Time</i>	<a href="#">The One Thing Married Women Should do to Protect Their Finances Before They Retire</a>	Ryan Derausseau
11/05/2018	<i>Humble Dollar</i>	<a href="#">Merging Money</a>	Kathleen Rehl
11/01/2018	<i>Sixty &amp; Me</i>	<a href="#">Marriage After 60: I Love Two Men, With the Blessings of Both</a>	Kathleen Rehl
08/13/2018	<i>Sixty &amp; Me</i>	<a href="#">How a Getaway With Girlfriends Can Enhance Your Friendships in Retirement</a>	Kathleen Rehl
06/20/2018	<i>Kbkweath connection</i>	<a href="#">Do You Want to be Hired or Fired by the New Widow?</a>	Kathleen Rehl
5/10/2018	<i>Sixty &amp; Me</i>	<a href="#">What Money Personality Type Are You? Spender, Idealist, Star, Avoider Or Something Else?</a>	Kathleen Rehl
02/09/2018	<i>Sixty &amp; Me</i>	<a href="#">Never Say "Never" When It Comes To Finding Love After A Loss</a>	Kathleen Rehl
02/05/2018	<i>Sixty &amp; Me</i>	<a href="#">New Guidebook For Widows Offers Hope, Financial Wisdom and a Positive Path Forward</a>	Margaret Manning
02/01/2018	<i>Financial Adviser News</i>	<a href="#">How Advisors Can Tailor Their Services For Widows</a>	Karen Demasters
01/19/2018	<i>USA Today</i>	<a href="#">How to prepare financially for being a widow/widower</a>	Robert Powell
12/02/2017	<i>Journal of Financial Planning</i>	<a href="#">Enhancing Financial Confidence Among Widows: The Role of Financial Professionals</a>	John E. Grable Carrie L. West Linda Y. Leitz Kathleen Rehl Carolyn C. Moor Michele Neff-Hernandez Susan Bradley
10/05/2017	<i>Sixty &amp; Me</i>	<a href="#">After 50 Dating: 10 Financial Questions To Ask Your Partner Before Committing</a>	Kathleen Rehl



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



Author, Educator, Mentor, Storyteller

● Empowering Widows Financially ● Inspiring Legacy and Longevity Planning

<https://www.KathleenRehl.com>

[KathleenRehl@gmail.com](mailto:KathleenRehl@gmail.com)



Empowering  
Widows  
Financially™

## Articles & More About Kathleen Rehl's Work

219 Stories			
Date	Published By	Title & Link (older links may be expired)	Author
08/25/2017	NAPFA Advisor Magazine	<a href="#">10 Questions To Ask Your Widowed Clients Who Re-partner</a>	Kathleen Rehl
08/21/2017	Sixty & Me	<a href="#">Why Are Mature Women Living With Their Partners Rather Than Marrying?</a>	Kathleen Rehl
07/03/2017	Sixty & Me	<a href="#">Are We Too Old For Boyfriends In Our 60s?</a>	Kathleen Rehl
06/07/2017	Seeking Alpha	<a href="#">5 Financial Planning Tips For Working With Recent Widows</a>	Jack Waymire
05/01/2017	Journal of Financial Service Professionals Vol. 71, No. 3	<a href="#">Helping Repartnered Widows Navigate Romance and Finance: The Role of Financial Advice</a>	Kathleen Rehl Carrie L. West Linda Y. Leitz John E. Grable Carolyn C. Moor Michele Neff- Hernandez Susan Bradley
03/18/2017	Financial Advisor IQ	<a href="#">Have a Client in Crisis? Take It Slow and Easy</a>	Pedro Silva
03/10/2017	Advisor Connect: Financial Insights & Growth Strategies	<a href="#">Will You Be Hired or Fired by the New Widow?</a>	Kathleen Rehl
02/08/2017	FINRA: The Alert Investor	<a href="#">Managing Money Through Grief: 10 Tips for Widows and Widowers</a>	Alice Gomstyn
01/13/2017	Sixty & Me	<a href="#">Financial Advice For Widows: 9 Steps To Help You Get Control And Move Forward</a>	Kathleen Rehl
12/20/2016	Sixty & Me	<a href="#">Give Yourself a Legacy Gift By Repurposing Meaningful Jewelry</a>	Kathleen Rehl
11/4/2016	Sixty & Me	<a href="#">Financial Advice for Widows: What To Do Before You Remarry</a>	Kathleen Rehl
10/17/2016	Reader's digest	<a href="#">10 Things You Should Never Say to a Widow</a>	Deborah Weiss
10/04/2016	Sixty & Me	<a href="#">Love Is Eternal, But, Life Isn't! Facing the Chance of Becoming a Widow</a>	Kathleen Rehl
09/14/2016	Sixty & Me	<a href="#">5 Big Mistakes that Widows Make and How to Avoid Them</a>	Kathleen Rehl

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



Author, Educator, Mentor, Storyteller

● Empowering Widows Financially ● Inspiring Legacy and Longevity Planning

<https://www.KathleenRehl.com>

[KathleenRehl@gmail.com](mailto:KathleenRehl@gmail.com)



Empowering  
Widows  
Financially™

## Articles & More About Kathleen Rehl's Work

219 Stories			
Date	Published By	Title & Link (older links may be expired)	Author
08/17/2016	CNBC	<a href="#">Suddenly single: The realities of going from two to one</a>	Ilana Polyak
06/20/2016	Next Avenue	<a href="#">I Planned for Life as a Widow, But Got a Lot Wrong</a>	Ellen Uzelac
04/29/2016	Tampa Bay Times	<a href="#">Why are more Baby Boomers who can afford to buy a home renting instead?</a>	Susan Taylor Martin
04/23/2016	Sentinel Online	<a href="#">Expert offers story, advice on widowhood</a>	Judy Bryan
01/13/2016	CBS & Fox News: KEYC Mankato	<a href="#">Preparing Women For Financial Life After The Death Of Their Spouse</a>	Shawn Logging
01/05/2016	Journal of Financial Service Professionals Vol. 70, No. 1 pp.53-60	<a href="#">Widows' Voices: The Value of Financial Planning</a>	Kathleen Rehl Carolyn Moor Linda Leitz John Grable
10/28/2015	Financial Planning	<a href="#">Ensuring Success When Switching to a Flat Retainer Fee Model</a>	Carolyn McClanahan
10/05/2015	Financial Advisor IQ	<a href="#">Keeping Widows from Leaving Calls for a Delicate Dance</a>	R.A. Monroe
9/28/2015	Investment Advisor	<a href="#">Marketing Tips of the Trade</a>	Olivia Mellan
08/10/2015	Bankrate.com	<a href="#">A guide for widows on how to manage money</a>	Julie Landry Lavolette
07/27/2015	Susan's Women's Writing Circle blog	<a href="#">A Widow's Memoir Moment</a>	Kathleen Rehl
07/20/2015	The Chautauquan Daily	<a href="#">Rehl to advise widows about financial transition</a>	Deborah Trefts
07/18/2015	New Haven Register	<a href="#">DOLLARS &amp; SENSE: A little support goes a long way</a>	John Fitts
05/15/2015	Investment News	<a href="#">How to Talk to Clients Who Have Just Been Widowed</a>	Kathleen Rehl

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



Author, Educator, Mentor, Storyteller

● Empowering Widows Financially ● Inspiring Legacy and Longevity Planning

<https://www.KathleenRehl.com>

[KathleenRehl@gmail.com](mailto:KathleenRehl@gmail.com)



Empowering  
Widows  
Financially™

## Articles & More About Kathleen Rehl's Work

219 Stories			
Date	Published By	Title & Link (older links may be expired)	Author
04/03/2015	Sudden Money Institute - SMI Blog	<a href="#">Sharing Your Story, Values, Wealth, and Aspirations for Future Generations</a>	Kathleen Rehl
03/24/2015	Sudden Money Institute - SMI Blog	<a href="#">On Hosting Events for Widows</a>	Kathleen Rehl
12/01/2014	Broker World Magazine	<a href="#">How to Help Your Widowed Clients Make Wise Decisions with Life Insurance Benefits</a>	Kathleen Rehl
11/05/2014	JournalTimes.com	<a href="#">Retirement Income for Surviving Spouses</a>	Justus Morgan
10/27/2014	Sudden Money Institute - SMI Blog	<a href="#">A Tool To Use With Your Widowed Clients</a>	Kathleen Rehl
10/01/2014	ACP Financial Focus	<a href="#">Recommendations for Recent Widows</a>	Kathleen Rehl
10/01/2014	Broker World	<a href="#">Three Tips on What to Say to Your Widowed Client</a>	Kathleen Rehl
10/10/2014	Wall Street Journal	<a href="#">Wealth Adviser: Are You Guilty of 'Due-Diligence Lite' on Funds?</a>	Kevin Noblet
09/09/2014	Wall Street Journal	<a href="#">A 'Financial Retreat' for a Widow</a>	Austin Kilham
08/17/2014	Investment News	<a href="#">Advising Women Through Transitions</a>	Staff
08/03/2014	The Chautauquan Daily	<a href="#">Rehl to Advise Widows On Emotional And Financial Transitions</a>	Deborah Trefts
07/23/2014	Investment News	<a href="#">Advisers Need to be Nurturers When Helping a Woman Through Life Changes</a>	Alessandra Malito
07/10/2014	CNBC	<a href="#">Widows: Don't Let Grief Cloud Financial Judgment</a>	Ilana Polyak
Summer 2014	Woodbury Connection	<a href="#">6 Tips for Working with New Widows</a>	Kathleen Rehl
06/17/2014	Blueleaf	<a href="#">What to Say [and NOT Say] to a Grieving Widowed Client</a>	Kathleen Rehl
05/30/2014	Miami Herald	<a href="#">When Husband Dies, Widows Must Deal with Grief And Finances</a>	Julie Landry Laviolette



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



Author, Educator, Mentor, Storyteller

● Empowering Widows Financially ● Inspiring Legacy and Longevity Planning

<https://www.KathleenRehl.com>

[KathleenRehl@gmail.com](mailto:KathleenRehl@gmail.com)



## Articles & More About Kathleen Rehl's Work

219 Stories			
Date	Published By	Title & Link (older links may be expired)	Author
05/12/2014	Blueleaf	<a href="#">Faced with This Unpredictable Client Moment, Pause and Don't Talk About the Market</a>	Kathleen Rehl
04/28/2104	Research Magazine	<a href="#">Grieving Clients, Sensitive Advisors</a>	Ellen Uzelac
04/15/2014	CNBC	<a href="#">From Grief TO Growth and Beyond, A Widow Can Lead A Rewarding Life</a>	Kathleen Rehl
04/20/2014	CNBC	<a href="#">After Grief, New Widows Must Reevaluate Finances</a>	Kathleen Rehl
04/10/2014	CNBC	<a href="#">New Widows Take Stock of Finances</a>	Kathleen Rehl
03/18/2014	CNBC	<a href="#">What do Women Want? Financial Advisors Who Get It</a>	Kelley Holland
02/24/2014 (March print issue)	Investment Advisor	<a href="#">Working with Widows ~&amp;~ Learning More About Working with Widows</a>	Olivia Mellan
02/07/2014	Citizen-Times.com	<a href="#">Widows Need Financial Education</a>	Al Davis
01/21/2014	Financial Advisor IQ	<a href="#">Office Decor Is More Important Than You Think</a>	Miriam Rozen
01/16/2104	MoneyNews.com	<a href="#">Senior Scams Hit Victims with \$2.9 Billion in Annual Losses</a>	Michelle Smith
01/12/2014	Tampa Tribune	<a href="#">Widowed Financial Planner Offers Workshop In Brandon</a>	Barbara Routen
01/12/2014	Tampa Tribune	<a href="#">Speaker's Concern for Widows Started On 9/11</a>	Barbara Routen
01/04/2014	CNBC	<a href="#">More Financial Fraudsters are Targeting Seniors</a>	Kelley Holland
12/01/2013	Inside Information	<a href="#">Planning In Widowhood</a>	Bob Veres
12/01/2013	Financial Planning magazine & web	<a href="#">7 Financial Advisors With Great Side Gigs</a>	Staff
11/01/2013	Gather-national	<a href="#">Advice for New Widows</a>	Kathleen Rehl

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



Author, Educator, Mentor, Storyteller

● Empowering Widows Financially ● Inspiring Legacy and Longevity Planning

<https://www.KathleenRehl.com>

[KathleenRehl@gmail.com](mailto:KathleenRehl@gmail.com)



## Articles & More About Kathleen Rehl's Work

219 Stories			
Date	Published By	Title & Link (older links may be expired)	Author
	<i>magazine of Women of the ELCA</i>		
10/01/2013	<i>Wall Street Journal</i>	<a href="#">Wealth Adviser: Helping Federal Employees Cinch the Belt Another Notch</a>	
09/30/2013	CNBC	<a href="#">Expert Offers Financial Advice For the Recently Widowed</a>	Kathleen Rehl
06/20/2013	<i>Investment News</i>	<a href="#">15 Transformational Advisers: Harold Evensky &amp; Deena Katz</a>	Jeff Benjamin
06/01/2013	<i>Investment News</i>	<a href="#">An Unconventional Exit From the Business</a>	Liz Skinner
06/01/2013	<i>Mindful Money Magazine (iPad app)</i>	<a href="#">Kathleen M. Rehl Ph.D., CFP® speaks at a Workshop for Widows, Wives &amp; Friends</a>	Fern Alix LaRocca
05/28/2013	<i>Reuters</i>	<a href="#">Widows and Divorcees Put Money In Motion</a>	Beth Pinsker
05/17/2013	<i>The Forum of Fargo-Moorhead</i>	<a href="#">A Vulnerable Time: Widows Need to Guard Against 'Financial Wolves'</a>	Staff
04/11/2013	<i>Lake Oswego Review</i>	<a href="#">Finding The Right Way For Widows</a>	Staff
02/19/2013	<i>Advisor Perspectives</i>	<a href="#">Six Recommendations for Working with Widows</a>	Kathleen Rehl
02/09/2013	<i>USA Today</i>	<a href="#">MoneyWatch: Better to Rent Or To Sell A House?</a>	Kathleen Rehl
01/23/2013	<i>Florida Today</i>	<a href="#">Mary Baldwin: New Widow Overwhelmed by Financial Decisions</a>	Mary Baldwin
01/01/2013	<i>Spacecoast Living.com</i>	<a href="#">Suddenly Single. Now What?</a>	Robert J. Rall
01/01/2013	<i>ACP Financial Focus</i>	<a href="#">Put Your Gratitude Into Action</a>	Kathleen Rehl
11/01/2012	<i>NAPFA Advisor Magazine</i>	<a href="#">Practical Points in Serving Widows</a>	Kathleen Rehl
Fall 2012	<i>Ft. Leonard Wood Survivor Outreach Services Newsletter</i>	<a href="#">Financial Information for Survivors Page 3</a>	Staff

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



Author, Educator, Mentor, Storyteller

● Empowering Widows Financially ● Inspiring Legacy and Longevity Planning

<https://www.KathleenRehl.com>

[KathleenRehl@gmail.com](mailto:KathleenRehl@gmail.com)



Empowering  
Widows  
Financially™

## Articles & More About Kathleen Rehl's Work

219 Stories			
Date	Published By	Title & Link (older links may be expired)	Author
08/01/2012	Army Survivor Outreach Services Newsletter	<a href="#">Mark Her Words Pages 4-7</a>	Mark Dunlop
06/21/2012	Think Advisor	<a href="#">Divorcees, Widows Use Advisors More Than Men</a>	Joyce Hanson
06/01/2012	ACP Financial Focus	<a href="#">"Magical Thinking" Isn't a Plan</a>	Kathleen Rehl
05/18/2012	Financial Advisor a blog by Dow Jones	<a href="#">How to Get A Wife Interested In Investing</a>	Staff
05/07/2012	The Wall Street Journal	<a href="#">Five Mistakes You May Be Making</a>	Veronica Dagher
03/13/2012	onwallstreet.com	<a href="#">Women Advisors Forum: Ways Wealth Managers Can Work with Widows</a>	Staff
01/15/2012	Bottom Line Personal	<a href="#">After a Spouse Dies... Important Financial Steps to Take Right Away</a>	Kathleen Rehl
12/31/2011	The New York Times	<a href="#">Footsteps to Follow in the Coming Year</a>	Ron Lieber
12/23/2011	Marotta on Money	<a href="#">Helping Widows Move Forward On Their Own</a>	David John Marotta
11/25/2011	Investment News	<a href="#">What Worries Advisers As We Enter 2012</a>	Fred Gabriel
10/17/2011	The Vanguard Group	<a href="#">A Widow's Guide To Financial Decisions</a>	Staff
10/12/2011	A Dow Jones Newswires Column	<a href="#">Listening First is Key With Widows</a>	Staff
10/11/2011	Pocono Record	<a href="#">5 Financial Rules for Grieving Spouses</a>	Erin Baehr
10/02/2011	Investment News	<a href="#">Patience Is Key When Working With Widows</a>	Jim Pavia
10/01/2011	Senior Market Advisor	<a href="#">Estate Planning for Senior Women</a>	Staff

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



Author, Educator, Mentor, Storyteller

● Empowering Widows Financially ● Inspiring Legacy and Longevity Planning

<https://www.KathleenRehl.com>

[KathleenRehl@gmail.com](mailto:KathleenRehl@gmail.com)



**Empowering  
Widows  
Financially™**

## Articles & More About Kathleen Rehl's Work

219 Stories			
Date	Published By	Title & Link (older links may be expired)	Author
09/25/2011	<i>St. Petersburg Times</i>	<a href="#">Financial Planner's Own Experience Helps Her Guide Widows In Money Matters</a>	Susan Taylor Martin
09/19/2011	<i>The Wall Street Journal</i>	<a href="#">Alone...and Confused</a>	Veronica Dagher
09/04/2011	<i>Investment News</i>	<a href="#">A Passion for Working with Widows</a>	Jeff Benjamin
09/03/2011	<i>The New York Times</i>	<a href="#">For the Recently Widowed, Some Big Financial Pitfalls to Avoid</a>	Ron Lieber
08/29/2011	<i>Kiplinger's Retirement Report</i>	<a href="#">A To-Do List for the Surviving Spouse</a>	Susan B. Garland
08/01/2011	<i>Squared Away Blog</i>	<a href="#">Widowed Advisor Strives to Help Others</a>	Staff
07/01/2011	<i>NAPFA Advisor</i>	<a href="#">Affairs of Estate (The Rehl Approach)</a>	Staff
07/01/2011	<i>Senior Market Advisor</i>	<a href="#">Estate Planning</a>	Susan B. Garland
06/01/2011	<i>AARP Bulletin</i>	<a href="#">Marriage and Money</a>	Jane Bryant Quinn
04/01/2011	<i>Consumer Reports Money Adviser</i>	<a href="#">Make Estate Planning a Family Affair</a>	Staff
03/24/2011	<i>The New York Times</i>	<a href="#">Money Through the Ages: Pondering Risks in Retirement</a>	Tara Siegel Bernard
03/01/2011	<i>Kiplinger's Retirement Report</i>	<a href="#">Information to Act On</a>	Staff
03/01/2011	<i>ACP Financial Focus</i>	<a href="#">Money-Smart Steps for Recent Widows</a>	Kathleen Rehl
02/01/2011	<i>NAPFA Advisor</i>	<a href="#">The Write Stuff</a>	Staff
01/01/2011	<i>Caring Connections</i>	<a href="#">Book Review</a>	Staff
12/01/2010	<i>NAPFA Advisor</i>	<a href="#">Financial Planning for Women</a>	Staff
12/27/2010	<i>Help Me Publish Blog</i>	<a href="#">Interview: Kathleen Rehl, Ph.D., CFP</a>	Tamara Dever

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



Author, Educator, Mentor, Storyteller

● Empowering Widows Financially ● Inspiring Legacy and Longevity Planning

<https://www.KathleenRehl.com>

[KathleenRehl@gmail.com](mailto:KathleenRehl@gmail.com)

## Articles & More About Kathleen Rehl's Work

219 Stories			
Date	Published By	Title & Link (older links may be expired)	Author
12/13/2010	<i>The Wall Street Journal</i>	<a href="#">Financial Planning for One Is Easier Than Two – But Hardly Easy</a>	Veronica Dagher
09/01/2010	<i>Tapestry</i>	<a href="#">Steps for Recent Widows</a>	Kathleen Rehl
09/01/2010	<i>U.S. News &amp; World Report</i> – <i>The Best Life Blog</i>	<a href="#">Advice for Widows and Older Couples, Too</a>	Philip Moeller
06/01/2010	<i>Dow Jones Investment Advisor Blog</i>	<a href="#">Kathleen Rehl, On Working with Widows</a>	Staff
06/01/2009	<i>Investment News</i>	<a href="#">Widows' Needs Being Ignored By Advisors</a>	Lisa Shidler
02/01/2008	<i>Investment News</i>	<a href="#">Making a New Widow's Life Easier</a>	Kathleen Rehl