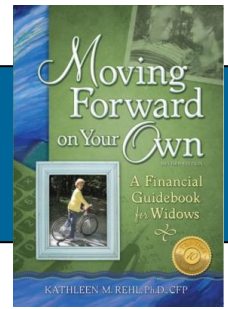




Kathleen M. Rehl, Ph.D., CFP®, CeFT® Emeritus

Happily “ReFired” Author | Legacy Storyteller | Advocate

<https://KathleenRehl.com>



Resumé

Story of Origin from My Heart

As of 1/12/2023

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 tenure
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, Fun, Focused-purpose,
Friends, and Fitness (body, mind, spirit, & money)
Creating as legacy writer and nonprofit ambassador.

Fantastic Chapter!



Keep reading next page . . .

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

Kathleen wrote the multi-award-winning book, [*Moving Forward on Your Own: A Financial Guidebook for Widows*](#), with about 80,000 copies in circulation today. She owned Rehl Financial Advisors for 18 years before retiring to a six-year encore career empowering widows through her research, writing, and speaking across the country. Now happily “reFired” at age 76, Kathleen pens pieces about widows and money, along with longevity and end-of-life planning. However, she focuses on legacy writing—stories, poems, and letters. Kathleen assists select nonprofits with their endowment programs. Her work has been featured in about 190 articles published by the *New York Times*, *Wall Street Journal*, *Kiplinger’s*, *CNBC*, *USA Today*, and many others. Her website is <https://KathleenRehl.com>.

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 about 190 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

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

Professional History

- 2020-current—“ReFired” Author | Nonprofit Ambassador | Advocate
- 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

