



FPA of Metro New York 20th Annual Forum



Kathleen Rehl, Phd., CFP®, CeFT

Educator, Speaker, Author, Mentor Researcher
Rehl WEALTH Collaborations LLC

Dr. Kathleen Rehl is a leading authority on widows and their financial issues. A widow herself, she's passionate about inspiring other widows and their advisors. Kathleen is the author of the multi-award-winning book, *Moving Forward on Your Own: A Financial Guidebook for Widows*. She's frequently invited to speak at industry meetings and conferences, in addition to events sponsored by advisors, foundations and other non-profit groups.

Kathleen's work has been featured in the *Wall Street Journal*, *New York Times*, *Kiplinger's*, *Money*, *U.S. News & World Report*, *CNBC*, *Reuters*, *USA Today*, *AARP Bulletin* and many more. The U.S. Army uses her guidebook in their Survivor Outreach Services centers worldwide.

After 17 years of providing personal financial advice, she now speaks, teaches, writes, mentors and does research through her firm, Rehl WEALTH Collaborations LLC. Kathleen is on the faculty of Sudden Money Institute and serves as Dean of Women at the Purposeful Planning Institute. Most recently, Kathleen and her research team are studying widows and their financial issues.

Kathleen has walked the walk about which she speaks and writes . . . focusing on women who have loved and lost—inspiring them to move forward on their own . . . yet not alone. Her core values shape practical ideas and tools that assist professionals to understand and serve widowed clients well.

[Read more](#) about Kathleen, including the many national events and conferences at which she has spoken.