Rehl WEALTH COLLABORATIONS

Date	Publication	Article Title	Author
08/25/2017	*NAPFA Advisor Magazine*	10 Questions To Ask Your Widowed Clients Who Re-partner	Kathleen Rehl
08/21/2017	*Sixty & Me*	Why Are Mature Women Living With Their Partners Rather Than Marrying?	Kathleen Rehl
07/03/2017	*Sixty & Me*	Are We Too Old For Boyfriends In Our 60s?	Kathleen Rehl
05/01/2017	*Journal of Financial Service Professionals Vol. 71, No. 3*	Helping Repartnered Widows Navigate Romance and Finance: The Role of the Financial Advice	Kathleen M. Rehl, Carrie L. West, Linda Y. Leitz, John E. Grable, Carolyn C. Moor Michele Neff-Hernandez Susan Bradley
03/18/2017	*Financial Advisor IQ*	Have a Client in Crisis? Take It Slow and Easy	Pedro Silva
03/10/2017	*Advisor Connect: Financial Insights & Growth Strategies*	Will You Be Hired or Fired by the New Widow?	Kathleen Rehl
02/08/2017	*FINRA: The Alert Investor*	Managing Money Through Grief: 10 Tips for Widows and Widowers	Alice Gomstyn
01/13/2017	*Sixty & Me*	Financial Advice For Widows: 9 Steps To Help You Get Control And Move Forward	Kathleen Rehl
12/20/2016	*Sixty & Me*	Give Yourself a Legacy Gift By Repurposing Meaningful Jewelry	Kathleen Rehl
11/4/2016	*Sixty & Me*	Financial Advice for Widows: What To Do Before You Remarry	Kathleen Rehl
10/17/2016	*Reader's digest*	10 Things You Should Never Say to a Widow	Deborah Weiss
10/04/2016	*Sixty & Me*	Love Is Eternal, But, Life Isn't! Facing the Chance of Becoming a Widow	Kathleen Rehl
09/14/2016	*Sixty & Me*	5 Big Mistakes that Widows Make and How to Avoid Them	Kathleen Rehl
08/17/2016	*CNBC*	Suddenly single: The realities of going from two to one	Ilana Polyak
06/20/2016	*Next Avenue*	I Planned for Life as a Widow, But Got a Lot Wrong	Ellen Uzelac
04/29/2016	*Tampa Bay Times*	Why are more Baby Boomers who can afford to buy a home renting instead?	Susan Taylor Martin
04/23/2016	*Sentinel Online*	Expert offers story, advice on widowhood	Judy Bryan
01/13/2016	*CBS & Fox News: KEYC Mankato*	Preparing Women For Financial Life After The Death Of Their Spouse	Shawn Loging

01/05/2016	*Journal of Financial Service Professionals Vol. 70, No. 1 pp.53-60*	Widows' Voices: The Value of Financial Planning	Kathleen Rehl Carolyn Moor Linda Leitz John Grable
10/28/2015	*Financial Planning*	Ensuring Success When Switching to a Flat Retainer Fee Model	Carolyn McClanahan
10/05/2015	*Financial Advisor IQ*	Keeping Widows from Leaving Calls for a Delicate Dance	R.A. Monroe
9/28/2015	*Investment Advisor*	Marketing Tips of the Trade	Olivia Mellan
08/10/2015	*Bankrate.com*	A guide for widows on how to manage money	Julie Landry Laviolette
07/27/2015	*Susan's Women's Writing Circle blog*	A Widow's Memoir Moment	Kathleen Rehl
07/20/2015	*The Chautauquan Daily*	Rehl to advise widows about financial transition	Deborah Trefts
07/18/2015	*New Haven Register*	DOLLARS & SENSE: A little support goes a long way	John Fitts
05/15/2015	*Investment News*	How to Talk to Clients Who Have Just Been Widowed	Kathleen Rehl
04/03/2015	*Sudden Money Institute - SMI Blog*	Sharing Your Story, Values, Wealth, and Aspirations for Future Generations	Kathleen Rehl
03/24/2015	*Sudden Money Institute - SMI Blog*	On Hosting Events for Widows	Kathleen Rehl
12/01/2014	*Broker World Magazine*	How to Help Your Widowed Clients Make Wise Decisions with Life Insurance Benefits	Kathleen Rehl
11/05/2014	*JournalTimes.com*	Retirement Income for Surviving Spouses	Justus Morgan
10/27/2014	*Sudden Money Institute - SMI Blog*	A Tool To Use With Your Widowed Clients	Kathleen Rehl
10/01/2014	*ACP Financial Focus*	Recommendations for Recent Widows	Kathleen Rehl
10/01/2014	*Broker World*	Three Tips on What to Say to Your Widowed Client	Kathleen Rehl
09/16/2014	*BlueRidgeNow.com*	Doctors to Host "Aging In Place' Workshops	Staff
10/10/ 2014	*Wall Street Journal*	Wealth Adviser: Are You Guilty of 'Due-Diligence Lite' on Funds?	Kevin Noblet
09/09/2014	*Wall Street Journal*	A 'Financial Retreat' for a Widow	Austin Kilham
08/17/2014	*Investment News*	Advising Women Through Transitions	Staff
08/03/2014	*The Chautauquan Daily*	Rehl to Advise Widows On Emotional And Financial Transitions	Deborah Trefts
07/23/2014	*Investment News*	Advisers Need to be Nurturers When Helping a Woman Through Life Changes	Alessandra Malito

07/10/2014	*CNBC*	Widows: Don't Let Grief Cloud Financial Judgment	Ilana Polyak
Summer 2014	*Woodbury Connection*	6 Tips for Working with New Widows	Kathleen Rehl
06/17/2014	*Blueleaf*	What to Say [and NOT Say] to a Grieving Widowed Client	Kathleen Rehl
05/30/2014	*Miami Herald*	When Husband Dies, Widows Must Deal with Grief And Finances	Julie Landry Laviolette
05/12/2014	*Blueleaf*	Faced with This Unpredictable Client Moment, Pause and Don't Talk About the Market	Kathleen Rehl
04/28/2104	*Research Magazine*	Grieving Clients, Sensitive Advisors	Ellen Uzelac
04/15/2014	*CNBC*	From Grief TO Growth and Beyond, A Widow Can Lead A Rewarding Life	Kathleen Rehl
04/20/2014	*CNBC*	After Grief, New Widows Must Reevaluate Finances	Kathleen Rehl
04/10/2014	*CNBC*	New Widows Take Stock of Finances	Kathleen Rehl
03/18/2014	*CNBC*	What do Women Want? Financial Advisors Who Get It	Kelley Holland
02/24/2014 (March print issue)	*Investment Advisor*	Working with Widows ~&~ Learning More About Working with Widows	Olivia Mellan
02/07/2014	*Citizen-Times.com*	Widows Need Financial Education	Al Davis
01/21/2014	Financial Advisor IQ	Office Decor Is More Important Than You Think	Miriam Rozen
01/16/2104	*MoneyNews.com*	Senior Scams Hit Victims with $2.9 Billion in Annual Losses	Michelle Smith
01/12/2014	*Tampa Tribune*	Widowed Financial Planner Offers Workshop In Brandon	Barbara Routen
01/12/2014	*Tampa Tribune*	Speaker's Concern for Widows Started On 9/11	Barbara Routen
01/04/2014	*CNBC*	More Financial Fraudsters are Targeting Seniors	Kelley Holland
01/01/2014	*Mountain Xpress*	Press Release: On Track to Hold Financial Workshop For Widows Feb. 21	Staff
12/01/2013	*Inside Information*	Planning In Widowhood	Bob Veres

12/01/2013	*Financial Planning magazine & web*	7 Financial Advisors With Great Side Gigs	Staff
11/01/2013	*Gather-national magazine of Women of the ELCA*	Advice for New Widows	Kathleen Rehl
10/01/2013	*Wall Street Journal*	Wealth Adviser: Helping Federal Employees Cinch the Belt Another Notch	
09/30/2013	*CNBC*	Expert Offers Financial Advice For the Recently Widowed	Kathleen Rehl
06/20/2013	*Investment News*	15 Transformational Advisers: Harold Evensky & Deena Katz	Jeff Benjamin
06/01/2013	*Investment News*	An Unconventional Exit From the Business	Liz Skinner
06/01/2013	*Mindful Money Magazine (IPad app)*	Kathleen M. Rehl Ph.D., CFP® speaks at a Workshop for Widows, Wives & Friends	Fern Alix LaRocca
05/28/2013	*Reuters*	Widows and Divorcees Put Money In Motion	Beth Pinsker
05/17/2013	*The Forum of Fargo-Moorhead*	A Vulnerable Time: Widows Need to Guard Against 'Financial Wolves'	Staff
04/11/2013	*Lake Oswego Review*	Finding The Right Way For Widows	Staff
02/19/2013	*Advisor Perspective*	Six Recommendations for Working with Widows	Kathleen Rehl
02/09/2013	*USA Today*	MoneyWatch: Better to Rent Or To Sell A House?	Kathleen Rehl
01/23/2013	*Florida Today*	Mary Baldwin: New Widow Overwhelmed by Financial Decisions	Mary Baldwin
01/01/2013	*Spacecoast Living.com*	Suddenly Single. Now What?	Robert J. Rall
01/01/2013	*ACP Financial Focus*	Put Your Gratitude Into Action	Kathleen Rehl
11/01/2012	*NAPFA Advisor Magazine*	Practical Points in Serving Widows	Kathleen Rehl
Fall 2012	*Ft. Leonard Wood Survivor Outreach Services Newsletter*	Financial Information for Survivors Page 3	Staff
08/01/2012	*Army Survivor Outreach Services Newsletter*	Mark Her Words Pages 4-7	Mark Dunlop
06/21/2012	*Think Advisor*	Divorcees, Widows Use Advisors More Than Men	Joyce Hanson
06/01/2012	*ACP Financial Focus*	"Magical Thinking" Isn't a Plan	Kathleen Rehl
05/18/2012	*Financial Advisor a*	How to Get A Wife Interested In Investing	Staff

	blog by Dow Jones		
05/07/2012	*The Wall Street Journal*	Five Mistakes You May Be Making	Veronica Dagher
03/13/2012	*onwallstreet.com*	Women Advisors Forum: Ways Wealth Managers Can Work with Widows	Staff
01/15/2012	*Bottom Line Personal*	After a Spouse Dies… Important Financial Steps to Take Right Away	Kathleen Rehl
12/31/2011	*The New York Times*	Footsteps to Follow in the Coming Year	Ron Lieber
12/23/2011	*Marotta on Money*	Helping Widows Move Forward On Their Own	David John Marotta
11/25/2011	*Investment News*	What Worries Advisers As We Enter 2012	Fred Gabriel
10/17/2011	*The Vanguard Group*	A Widow's Guide To Financial Decisions	Staff
10/12/2011	*A Dow Jones Newswires Column*	Listening First is Key With Widows	Staff
10/11/2011	*Pocono Record*	5 Financial Rules for Grieving Spouses	Erin Baehr
10/02/2011	*Investment News*	Patience Is Key When Working With Widows	Jim Pavia
10/01/2011	*Senior Market Advisor*	Estate Planning for Senior Women	Staff
09/25/2011	*St. Petersburg Times*	Financial Planner's Own Experience Helps Her Guide Widows In Money Matters	Susan Taylor Martin
09/19/2011	*The Wall Street Journal*	Alone…and Confused	Veronica Dagher
09/04/2011	*Investment News*	A Passion for Working with Widows	Jeff Benjamin
09/03/2011	*The New York Times*	For the Recently Widowed, Some Big Financial Pitfalls to Avoid	Ron Lieber
08/29/2011	*Kiplinger's Retirement Report*	A To-Do List for the Surviving Spouse	Susan B. Garland
08/01/2011	*Squared Away Blog*	Widowed Advisor Strives to Help Others	Staff
07/01/2011	*NAPFA Advisor*	Affairs of Estate (The Rehl Approach)	Staff
07/01/2011	*Senior Market Advisor*	Estate Planning	Susan B. Garland
06/01/2011	*AARP Bulletin*	Marriage and Money	Jane Bryant Quinn
04/01/2011	*Consumer Reports Money Adviser*	Make Estate Planning a Family Affair	Staff
03/24/2011	*The New York Times*	Money Through the Ages: Pondering Risks in Retirement	Tara Siegel Bernard
03/01/2011	*Kiplinger's*	Information to Act On	Staff

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03/01/2011	*Retirement Report ACP Financial Focus*	Money-Smart Steps for Recent Widows	Kathleen Rehl
02/01/2011	*NAPFA Advisor*	The Write Stuff	Staff
01/01/2011	*Caring Connections*	Book Review	Staff
12/01/2010	*NAPFA Advisor*	Financial Planning for Women	Staff
12/27/2010	*Help Me Publish* Blog	Interview: Kathleen Rehl, Ph.D., CFP	Tamara Dever
12/13/2010	*The Wall Street Journal*	Financial Planning for One Is Easier Than Two – But Hardly Easy	Veronica Dagher
09/01/2010	*Tapestry*	Steps for Recent Widows	Kathleen Rehl
09/01/2010	*U.S. News & World Report – The Best Life Blog*	Advice for Widows and Older Couples, Too	Philip Moeller
06/01/2010	*Dow Jones Investment Advisor Blog*	Kathleen Rehl, On Working with Widows	Staff
06/01/2009	*Investment News*	Widows' Needs Being Ignored By Advisors	Lisa Shidler
02/01/2008	*Investment News*	Making a New Widow's Life Easier	Kathleen Rehl