

3 Stages of Widowhood – Kathleen Rehl

Transition from Widow to Independent Woman©

Feel Financially Secure

"People gain so much hope when they know they are not experiencing something alone." --Joyce Rupp

Grief--numb

Financial Triage NEED TO BE HEARD
AND UNDERSTOOD

Highly vulnerable time

NO big irrevocable
decisions

Focus on immediate needs;
settle estate; cash flow &
asset review; file for benefits

breathe

Grace--transformation

Advanced Planning NEW LIFE EVOLVES

Advanced estate and
charitable planning

Special family issues

Your Story, Your Values,
Your Legacy™

fulfillment

Growth--journey

balance

General Planning COGNITIVE FUNCTIONS
NORMALIZED

"Financial Steps" finished

Basic estate planning,
investments & taxes

Pre or post-retirement
issues & house decisions

shutterstock_91133444 whats your story

Taking care of me

Taking care of business

Taking care of more