

A man with short, dark hair, wearing a grey sweater, is sitting on a dark wooden chair. He is smiling and looking towards the camera. The background is a light-colored wall with some shadows.

## ROB WRUBEL, CFP®

Specializing in financial planning  
and education for families  
with special-needs members

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Rob is a sought-after speaker helping families  
and professionals make sense of financial  
planning for families like his.

He will take audience members on a journey  
sharing his discoveries, learnings, and lessons as  
both a Dad and financial planner.

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**SPEAKER'S MEDIA KIT**





## Meet Rob

# BIO

Sixteen years ago Rob Wrubel switched careers and became a Certified Financial Planner. Little did he realize that it would not be the biggest change in his life. Within one year of his career change Wrubel saw the birth of his second child—a daughter with Down Syndrome. “The birth of my daughter changed my life—as a father, community member, and financial planner,” said Wrubel. My family has a great time together, and Sarah leads us in laughter and song. I’ve come to understand how our differences make us stronger and how each member of our community has something to offer.” Wrubel’s training has not only provided him with the financial knowledge to support his own special need family. It has also allowed him to author two books on the subject: *Financial Freedom for Special Needs Families: 9 Building Blocks to Reduce Stress, Preserve Benefits, and Create a Fulfilling Future* and *Protect Your Family: Life Insurance Basics For Special Needs Planning*.

Today, Wrubel also uses his knowledge to help other special needs families by serving as their CFP or by speaking to special needs groups. “Special needs families face financial challenges not faced by other parents, such as protecting governmental benefits by good planning, and balancing savings for retirement while having funds available to pay for disability-related expenses. They often come to my office in a state of fear and anxiety. They are overwhelmed with the decisions they need to make about their financial life and future planning. I understand their concerns because I am in their shoes. I look at this as a personal and professional mission”.

**Future Planning - Choosing Between Fear & Courage**

**Financial Freedom for Special Needs Families**

**The Blueprint Process - 9 Easy Steps to Financial Freedom Workshops, Keynotes and customized courses are available.**

For  
**Family Groups**

- **Everything You Need to Know For Special Needs Financial Planning**
- **Top Strategies on How to Protect Your Family's Future**
- **How to Remove The Worry, Plan The Right Way & Embrace Your Future**

For  
**Conferences, Doctors, Lawyers, CPAs, Hospitals**

- **The Importance of Financial Planning for Special-needs Families**
- **Quick Special-needs "Must Know" checklist for Attorneys, Doctors, CPAs and Hospitals**
- **Why Helping Special-needs families is so meaningful**
- **Top Questions You Are Probably Forgetting to Ask OR --**
- **Signs & Signals- You Might Be Missing The Chance to Help**
- **Tax Issues Funding a Trust (lawyers/CPAs)**

# Rob's Speech TOPICS

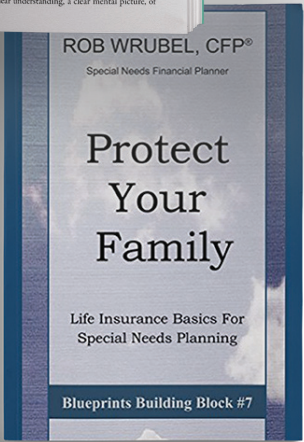
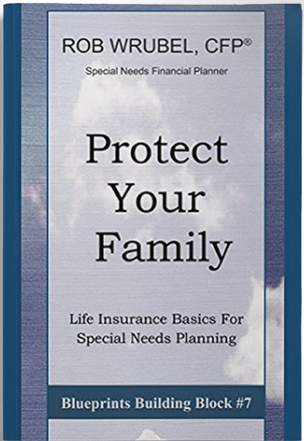
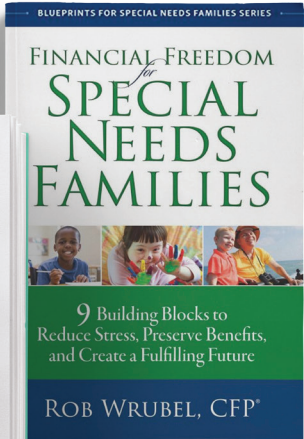
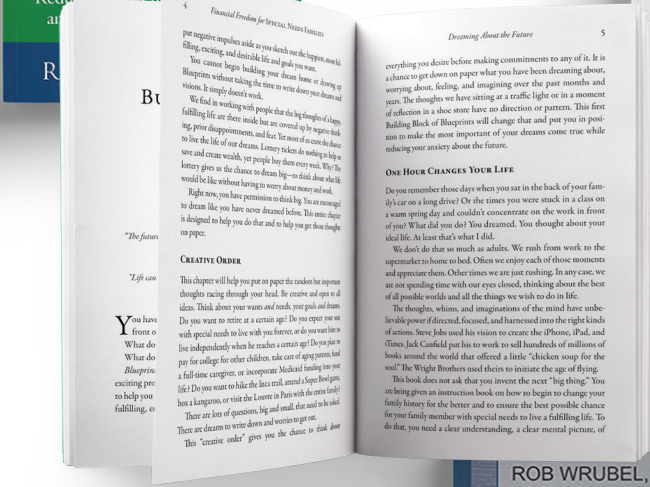
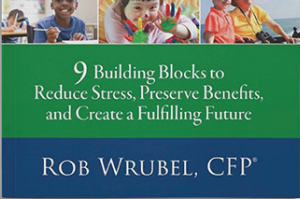
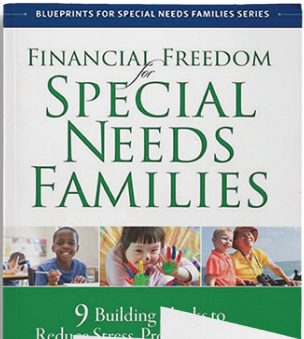
Custom Titles are Available,  
Based on Your Objectives

For  
**Professional Advisors- trust officers, trust companies, family offices.**

- **The 3 Drivers of Special-Needs Planning**
- **Able Act Accounts - Do we still need trusts?**
- **Insurance Strategies For Protecting Families**
- **2 Must Knows on Managing Assets in Special-Needs Trusts**



# Past Keynotes



20+ Large Regional events per Year

Available for panels and group discussions

Rob's books available pre-purchased at a discount for audience members

Email [Rob@robwrubel.com](mailto:Rob@robwrubel.com) for booking inquiries and pricing