# **ROB WRUBEL,** CFP<sup>®</sup>

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

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.

## SPEAKER'S MEDIA KIT



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 shows. 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.

## **Rob's Speech TOPICS**

Custom Titles are Available, Based on Your Objectives

### 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)

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

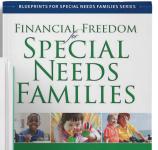
- The 3 Drivers of Special-Needs Planning
- \_\_\_\_ Able Act Accounts Do we still need trusts?
- Insurance Strategies For Protecting Families
- 2 Must Knows on Managing Assets in Special-Needs Trusts

## **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 for booking inquiries and pricing

9 Building Blocks to Reduce Stress, Preserve Benefits, and Create a Fulfilling Future

Rob Wrubel, CFP<sup>®</sup>



9 Building Blocks to

ROB WRUBEL, CFP<sup>\*</sup>

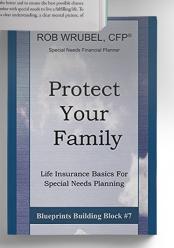
Dreaming About the Future

everydaig yw doine before making commitmens to any of it. It is a chaest to gre don'n o paper what you have been dreanning door, awryng door. Goling, and innyighing owr the paper nonobra of the dongly the first start of the paper nonbra of achiest in a top a term first no dream of the paper nondensity and the start first start of the start of the start of achiest in a top at the net have no dream on paper. This first achiest in a top at the inspection of your dream come rate while indexing start anisty about the firstare.

#### ONE HOUR CHANGES YOUR LIFE

Doyou remember those days when you sat in the back of your famby car on a long drive? Or the times you were stuck in a class on a warm speing day and couldn' concentrate on the work in front of you? What did you do? You dreamed. You thought about your ideal life, Ar least that's what I did. We don't do has o much as adults. We rush from work to the

We dark do that as much an adults. We read from work to the sprematizen biome code loft one we carging the drift one momentand approaches. Do not only one are just rathing he are years, we is corresponding mice biometers and the sprematice biometers of a prostle works and all the things we wish to do in fits. The thoughts, which are all magnetized on the first mice birt works are spremating mice and the site sprematice birth of the site of the strength of the site of the site of the site birth of the site of the si





9 Building

BLUEPRINTS FOR SPECIAL NEEDS FAMILIES SERIES



#### CREATIVE ORDER

"Life can This chapter will help you put on paper the randon but thoughts racing through your head. Be creative and open to al ideas. Think about your wants and needs, your goals and dr Y front o Do you want to retire at a certain age? Do you expect you so with special needs to live with you forever, or do you wan live independently when he reaches a certain age? Do you p What do nive interpretacencity which he reaches a certain ager Do you plan pay for college for other children, take care of aging parent, fail a full-time categorier, or incorporate Mediculd inadign into you life? Do you want to hike the linea trail, attend a Saper Boil gan. What do Bluetrin. exciting pro to help you box a kangaroo, or visit the Louvre in Paris with the entire There are lots of questions, big and small, that need to be aded fulfilling, ci wire down and This "creative order" gives you the chance to think also There are dreams to



www.RobWrubel.com