

25 Years of Service

Who we are:

KeatsConnelly is the largest cross-border wealth management firm in North America specializing in helping Canadians and Americans realize their dreams of a cross-border lifestyle.

How it began:

While working in the financial industry in Calgary during the 1970s, Bob Keats was among thousands of Americans working and living there as well. Bob assisted many of them with their cross-border financial needs. When Bob was transferred to the US in 1983, he found there to be many thousands of Canadians living and working here in the US. He knew these Canadians would need help with their cross-border financial matters, as did the Americans in Canada. A vision was born and a niche created -- Bob and co-founder, Tom Connelly, opened the doors to our Phoenix, Arizona office in 1990!

Bob Keats / President – Bob, a Canadian/US dual citizen, is one of the world’s leading authorities on US/Canada cross-border financial planning. Bob has written two books on the topic – *The Border Guide* and *A Canadian’s Best Tax Haven: The US / Take your Money and Drive!*

Dale Walters / Chief Executive Officer - Dale is known throughout North America for his cross-border tax and financial planning expertise. Dale has written two books as well -- *Buying Real Estate in the US* and *Taxation of Canadians in America*, the latter of these was written in collaboration with two of our other cross-border professionals, Sally Taylor and David Levine.

Milestones:

July 2005 – Opened our Florida office, now located in Boynton Beach

June 2012 – Opened our Canadian office in Calgary, Alberta

Acknowledgement:

Over the years, KeatsConnelly has been recognized for its achievements. We are proud recipients of the BBB Ethics award and the Greater Phoenix Chamber of Commerce Impact award.

Numerous times we were recognized as one of Arizona’s Most Admired Companies, for our Business Excellence in Workplace Flexibility and as a Top Wealth Management firm.

Our Community:

KeatsConnelly makes supporting our local community a priority. We have assisted on projects with charitable organizations such as Save the Family, Ronald McDonald House, Phoenix Children’s Hospital, Packages from Home, Feed My Starving Children and Habitat for Humanity.