



**ROBERT F. KEATS**

MASTER OF SCIENCE IN FINANCIAL PLANNING  
REGISTERED FINANCIAL PLANNER (CANADA)

Bob is founder and Executive Director at KeatsConnelly, the largest cross-border wealth management firm in North America specializing in helping Canadians and Americans realize their dreams of a cross-border lifestyle. Effective September 1, 2016, Bob stepped back from the role of President as he transitions into retirement. Bob will continue to work with existing clients and to help bring new clients to the firm.

Since 1976, Bob has been helping clients manage the complexities of US/Canadian cross-border planning when they are considering permanent or seasonal moves across the border. He is the author of two books, [\*The Border Guide\*](#) and [\*A Canadian's Best Tax Haven: The US\*](#). Bob is a frequent speaker in Canada and the US. Accountants, as well as Estate Planning and Elder Care attorneys often call upon him for his expertise.

**EDUCATION**

Master of Science in Financial Planning, 1990  
College for Financial Planning, Denver, Colorado

Bachelor of Science in Mechanical Engineering, 1972  
University of Manitoba, Manitoba, Canada

**CERTIFICATIONS**

Chartered Financial Planner, 1981  
Institute for Financial Planning, Toronto, Ontario,  
Canada

Registered Financial Planner (CANADA), 1987  
Institute of Advanced Financial Planning

**MEMBERSHIPS**

Financial Planners Standards Council of Canada  
National Association of Personal Financial Advisors, US  
Institute of Advanced Financial Planners, Canada  
National Advisors Trust Company – Board Member  
Canadian *Money Saver* – Columnist