



ROBERT F. KEATS

MASTER OF SCIENCE IN FINANCIAL PLANNING
CERTIFIED FINANCIAL PLANNER™ (US AND CANADA)
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

CERTIFIED FINANCIAL PLANNER™ (CANADA), 1996
Financial Planners Standards Council of Canada

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

CERTIFIED FINANCIAL PLANNER™ (US), 1986
Certified Financial Planner Board of Standards, Inc.

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

MEMBERSHIPS

International Board of Standards and Practices for Certified Financial Planners
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

KeatsConnelly Offices

3336 North 32nd Street, Suite 100 | Phoenix, AZ 85018 | T: (602) 955-5007
1880 North Congress Avenue, Suite 302 | Boynton Beach, FL 33426 | T: (561) 659-7401
1400, 350-7th Avenue SW | Calgary, Alberta T2P 3N9 | T: (403) 290-0026

www.keatsconnelly.com