



**DALE A. WALTERS**

CERTIFIED PUBLIC ACCOUNTANT

PERSONAL FINANCIAL SPECIALIST

CERTIFIED FINANCIAL PLANNER™ (US AND CANADA)

NAPFA - REGISTERED FINANCIAL ADVISOR

Dale is a partner and CEO of KeatsConnelly, the largest cross-border wealth management firm in North America that specializes in helping Canadians and Americans realize their dreams of a cross-border lifestyle. Serving clients for over thirty years, Dale was twice named one of the top financial advisors in the US by *Mutual Fund Magazine*, and has led the firm to numerous awards, including being named one of Arizona's Most Admired Companies, Phoenix Chamber's Impact award for Company Culture, the Alfred P. Sloan award for Workplace Flexibility and the Better Business Bureau award for Ethics. He is a frequent speaker on US-Canada financial planning and tax related issues, and is the author of *Buying Real Estate in the US – The Concise Guide for Canadians*.

Dale is a former four-time World Heavyweight Karate Champion and fourth degree black belt in Judo. He and his wife Charlene live in Phoenix, Arizona and have two children attending university.

**EDUCATION**

BACHELOR OF SCIENCE IN ACCOUNTING, 1989  
Arizona State University, Tempe, Arizona

**CERTIFICATIONS**

CERTIFIED FINANCIAL PLANNER™ (CANADA), 2000  
Financial Planners Standards Council of Canada

PERSONAL FINANCIAL SPECIALIST, 1996  
American Institute of Certified Public Accountants

CERTIFIED PUBLIC ACCOUNTANT, 1992  
Arizona Board of Accountancy

CERTIFIED FINANCIAL PLANNER™ (US), 1985  
Certified Financial Planner Board of Standards, Inc.

**AWARDS & RECOGNITION**

Outstanding Leadership Award – AZ Family College Savings Plan Oversight Committee, 2008  
Finalist for Phoenix Chamber of Commerce Small Business Person of the Year award, 2006  
Top US Financial Advisor – *Mutual Funds Magazine*, 2001 & 2002

**MEMBERSHIPS**

Hospice of the Valley – Board Member  
Rotary International, Club 100 - Member

**KeatsConnelly Offices**

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