



**DREW PHILLIPS**  
ACCREDITED ASSET MANAGEMENT SPECIALIST <sup>SM</sup>

Drew is Portfolio Manager at 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. As Portfolio Manager, Drew is responsible for all investment data and software. He is also the primary portfolio reviewer for financial planning clients.

Prior to joining KeatsConnelly, Drew earned his B.S. in Finance at Arizona State University. He is currently enrolled in an MBA program at Grand Canyon University and is expected to graduate in November 2011.

When Drew is not in the office, he enjoys playing basketball, golfing, and spending time with friends and family. He was recently married in June 2011 in San Francisco, California.

#### **EDUCATION**

BACHELOR OF SCIENCE IN FINANCE, 2008  
Arizona State University  
Tempe, Arizona

MASTER OF BUSINESS ADMINISTRATION WITH AN EMPHASIS IN FINANCE  
Expected Graduation: November 2011  
Grand Canyon University  
Phoenix, Arizona

#### **CERTIFICATIONS**

ACCREDITED ASSET MANAGEMENT SPECIALIST <sup>SM</sup>, 2011  
College of Financial Planning

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