



JOHN E. RICE

CHARTERED FINANCIAL ANALYST®

CERTIFIED FINANCIAL PLANNER™ (US)

MASTER OF BUSINESS ADMINISTRATION

John is a Senior Planner 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. In this role, John develops, coordinates and implements his clients' comprehensive cross-border and domestic financial plans and services. John is also a member of the firm's investment committee and investment strategy team. He works from our Boynton Beach, Florida office.

John is vice president of the CFA Society of South Florida, which serves to promote investment professionalism in South Florida. He is an instructor for economics and quantitative analysis in the Chartered Financial Analyst® preparatory programs at Florida Atlantic University in Boca Raton, Florida.

John has been quoted in SmartMoney magazine, MarketWatch, Research Magazine and other publications. Recent speaking engagements include the Financial Planning Association's Gold Coast Chapter, Vistage International, and investment conferences with Information Management Network. John is also a soccer coach with American Youth Soccer Organization. He has been helping individuals and families achieve their financial goals for over 20 years.

EDUCATION

MASTER OF BUSINESS ADMINISTRATION, 1997
Arizona State University, Tempe, Arizona

BACHELOR OF SCIENCE DEGREE IN PSYCHOLOGY, 1989
University of Arizona, Tucson, Arizona

CERTIFICATIONS

CERTIFIED FINANCIAL PLANNER™, 2000
Certified Financial Planner Board of Standards, Inc.

CHARTERED FINANCIAL ANALYST®, 2007
CFA Institute

MEMBERSHIPS

Financial Planning Association
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