



KEN LEW
MASTER OF BUSINESS ADMINISTRATION

Ken is an Investment Analyst at Keats Connelly, the largest cross-border wealth management firm in North America specializing in helping Canadians and Americans realize their dreams of a cross-border lifestyle. Ken is responsible for trading and reviewing client portfolios, researching potential investments, and back office operations for the Investment Department.

Ken started in the financial industry in 1993 and was with Merrill Lynch and Oppenheimer & Co., Inc. for the last ten years. As a former CFO, Business Consultant, Board Member, he has experience in estate planning, corporate finance and mergers/acquisitions.

Ken holds an MBA, a B.Sc. in Biology and a B.A. in Chemistry from the University of Washington and Seattle City University. In addition to his academic accomplishments, Ken has produced a Charitable Trust planning kit and has written numerous technical publications that his clients and colleagues continually benefit from.

Ken is also an Officer and former Board Member for the Greater Pinnacle Peak Association, a non-profit organization dedicated to the preservation of the natural environment and the enrichment of quality of life in the north Scottsdale Sonoran Desert. When he is not serving clients, Ken enjoys spending time with his wife and two children, and he also enjoys playing tennis and golf.

EDUCATION

Master of Business Administration
Seattle City University

Bachelor of Science in Biology
Bachelor of Arts in Chemistry
University of Washington

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