



Matt Lucas
CERTIFIED FINANCIAL PLANNER™ (US)

Matt is a Cross-Border Financial Planner 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. Matt is responsible for assisting clients and the planning staff in developing and implementing comprehensive cross-border plans from our Phoenix, Arizona office.

When away from the office, Matt enjoys watching sports, meeting new people, exploring the outdoors, and spending time with family and friends.

EDUCATION

Bachelor of Science in Global Business, 2010
Cum Laude
Arizona State University
Tempe, Arizona

CERTIFICATIONS

CERTIFIED FINANCIAL PLANNER™ (US), 2017
Certified Financial Planner Board of Standards, Inc

MEMBERSHIPS

Financial Planning Association

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