



Matt Lucas
REGISTERED PARAPLANNERSM

Matt is an Associate 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.

Matt is currently working on obtaining the CERTIFIED FINANCIAL PLANNERTM designation.

EDUCATION

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

CERTIFICATIONS

Registered ParaplannerSM, 2012
College for Financial Planning
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