



PETER J. HENRY

DIRECTOR OF FINANCE AND BUSINESS DEVELOPMENT

Peter Henry is the Director of Finance and Business Development 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. Peter's responsibilities include identifying opportunities and developing relationships with key prospects and clients, as well as defining and executing sales strategies and business development.

Peter has over 19 years of experience in global capital markets, during which he worked 13 years in wealth and investment management both in Canada and the United States. Peter also:

- served as the advisor for some of Canada's ultra-high net worth families, as well some of North America's most respected institutional fund managers, private equity firms, and pension funds,
- worked for one of America's top-ranked registered investment advisors,
- co-lead a team which was instrumental in the development of a unique direct asset investment structure and coordinated the distribution of this investment to one of the world's leading mercantile trading firms, and
- consulted to one of Canada's most respected independent energy research groups.

Peter is also a co-founder of the Calgary Foundation for Swimming Excellence.

Peter and his wife live in Scottsdale. They take tremendous pride and enjoyment raising their young children.

EDUCATION

University of New Mexico, B.A. Political Science and History

CERTIFICATIONS

Series 65

AWARDS & RECOGNITION

Co-Founder Calgary Foundation for Swimming Excellence

National Team Captain (Scotland, Swimming)

Former World Record Holder, Masters' Swimming