



RENÉE BELLEFEUILLE
CERTIFIED SENIOR ADVISOR®
REGISTERED PARAPLANNERSM

Renée is a Financial Planner and Special Projects Advisor 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. Renée coordinates and monitors her clients' cross-border and domestic financial planning services. As a Special Projects Advisor, Renée is responsible for continued client relationships. She is currently a member of the firm's Financial Planning Committee and Ethics Committee.

Renée has had a progressive career since joining the firm in 2001. She brings a great deal of client knowledge and high level of client service to her position. Renée is currently pursuing her Accredited Financial Counselor (AFC®) designation. Prior to joining KeatsConnelly, Renée was employed as a merchandise manager for a major New York garment manufacturer for more than ten years. Renée and her husband, Paul, enjoy skiing, hiking and spending time outdoors with their golden retriever.

EDUCATION

Associate's Degree in Occupational Studies, 1982
The Berkeley School, Hicksville, New York

CERTIFICATIONS

Certified Senior Advisor (CSA)® 2013
Society of Certified Senior Advisors
Denver, Colorado

Registered ParaplannerSM, 2006
College for Financial Planning
Denver, Colorado

Certified Notary Public – State Of Arizona

MEMBERSHIPS

National Association of Professional Organizers, National and Arizona Chapter
Certified Senior Advisors Leaders Network, Phoenix Chapter

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