



**RENÉE BELLEFEUILLE**  
CERTIFIED SENIOR ADVISOR®  
REGISTERED PARAPLANNER<sup>SM</sup>

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 Roundtable 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 Paraplanner<sup>SM</sup>, 2006  
College for Financial Planning  
Denver, Colorado

Certified Notary Public – State Of Arizona

#### **MEMBERSHIPS**

Association for Financial Planning and Education  
Certified Senior Advisors Leaders Network, Phoenix Chapter  
East Valley Committee on Aging

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