



*Bridging the Border to
Your Financial Future*



MR. ROBERT F. KEATS
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Bob is a founder and President of Keats, Connelly and Associates, a Phoenix-based, *Fee-Only**, wealth management firm that assists Canadians and Americans realize their dreams of a cross-border lifestyle.

Since 1976, Bob has been helping clients manage the complexities of U.S./Canadian cross-border planning when they are considering permanent or seasonal moves across the border. He is the author of *The Border Guide*, currently in its 10th edition.

Bob is a frequent speaker in Canada and the U.S. on Cross-Border Planning. Accountants, Estate Planning and Elder Care Attorneys often call upon him for his expertise.

EDUCATION

MASTER OF SCIENCE IN FINANCIAL PLANNING, 1990
College for Financial Planning, Denver, Colorado

BACHELOR OF SCIENCE IN MECHANICAL ENGINEERING, 1972
University of Manitoba, Manitoba, Canada

CERTIFICATIONS

CERTIFIED FINANCIAL PLANNER™ (CANADA), 1996
Financial Planners Standards Council of Canada

REGISTERED FINANCIAL PLANNER (CANADA), 1987
Institute of Advanced Financial Planning

CERTIFIED FINANCIAL PLANNER™ (U.S.), 1986
Certified Financial Planner Board of Standards, Inc.

CHARTERED FINANCIAL PLANNER, 1981
Institute for Financial Planning, Toronto, Ontario, Canada

MEMBERSHIPS

International Board of Standards and Practices for Certified Financial Planners
The Financial Advisors Association of Canada
Financial Planners Standards Council of Canada
National Association of Personal Financial Advisors
Institute of Advanced Financial Planners, Canada
Canadian Journal of Financial Planning – Editorial Review Board
Canadian *Money Saver* – Columnist
National Advisors Trust Company – Board Member

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