



SALLY A. TAYLOR

MASTER OF SCIENCE IN FINANCIAL PLANNING
CERTIFIED PUBLIC ACCOUNTANT
PERSONAL FINANCIAL SPECIALIST
CERTIFIED FINANCIAL PLANNER™

Sally is the Director of Financial Planning and a senior planner at KeatsConnelly, the largest cross-border wealth management firm in North America that specializes in helping Canadians and Americans realize their dreams of a cross-border lifestyle. Sally handles clients' financial and tax planning, and helps manage their comprehensive cross-border and domestic financial affairs. She also oversees the financial planning department and chairs the Financial Planning Committee.

Before joining KeatsConnelly, Sally provided family office financial services for prominent families in the Cleveland, Ohio area. She has worked as a comprehensive family office, accounting and financial professional since 1994.

Sally and her husband reside in Mesa and enjoy traveling throughout the southwest and the country.

EDUCATION

MASTER OF SCIENCE IN FINANCIAL PLANNING, 2008
College for Financial Planning, Denver, Colorado

BACHELOR OF SCIENCE IN ACCOUNTANCY, 1999
John Carroll University, University Heights, Ohio

CERTIFICATIONS

CERTIFIED FINANCIAL PLANNER™, 2009
Certified Financial Planner Board of Standards, Inc.

CERTIFIED PUBLIC ACCOUNTANT, 2008
Arizona Board of Accountancy

PERSONAL FINANCIAL SPECIALIST, 2005
American Institute of Certified Public Accountants

CERTIFIED PUBLIC ACCOUNTANT, 2001
Ohio Board of Accountancy (Transferred to Arizona)

MEMBERSHIPS

American Institute of Certified Public Accountants
Arizona Society of Certified Public Accountants
Financial Planning Association
Central Arizona Estate Planning Council

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