



## **SALLY A. TAYLOR**

MASTER OF SCIENCE IN FINANCIAL PLANNING

CERTIFIED PUBLIC ACCOUNTANT

PERSONAL FINANCIAL SPECIALIST

CERTIFIED FINANCIAL PLANNER™

Sally is the CEO 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. Sally has provided comprehensive financial advisory services in family offices and with KeatsConnelly for over 20 years. She is a frequent speaker on US-Canada financial planning and tax related issues and is a co-author of [\*Taxation of Canadians in America: Are YOU at risk?\*](#) and [\*Taxation of Americans in Canada: Are YOU at risk?\*](#) In addition to running the firm, Sally handles clients' financial and tax planning and helps their comprehensive cross-border and domestic financial affairs.

Sally was appointed by Governor Brewer in 2013 to the Arizona College Savings Plan Oversight Committee and currently sits on the Committee. She is a co-founder and a director of the Valley Welcome Alliance, an organization of Phoenix area businesses that welcome new residents to the Valley. Sally is the past president of Soroptimist International of Phoenix which is one of the largest Soroptimist clubs throughout the world and works to help educate, empower and enable opportunities for women and girls. She 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, 2001 (OH) and 2008 (AZ)  
Ohio Board of Accountancy (Transferred to Arizona)  
Arizona Board of Accountancy

Personal Financial Specialist, 2005  
American Institute of Certified Public Accountants

### **MEMBERSHIPS**

American Institute of Certified Public Accountants  
Arizona Society of Certified Public Accountants - Financial Planning Steering Committee Member  
Soroptimist International of Phoenix – Past President  
Arizona College Savings Plan Program Oversight Committee - Member  
Phoenix Committee on Foreign Relations – Member

#### KeatsConnelly Offices

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