



STEPHEN THOMPSON
CERTIFIED FINANCIAL PLANNER™

Stephen Thompson is an Associate Planner 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. Stephen assists clients and manages their comprehensive cross-border and domestic financial plans. He brings substantial international experience to his position.

Prior to joining KeatsConnelly, he was a financial advisor with financial services firms in Phoenix and Washington, D.C., where he helped clients, many of whom were foreign nationals, achieve their financial and retirement goals. His earlier career as a diplomat with the US Department of State gave him broad experience with international economic and trade issues.

He and his wife live in Phoenix with their three dogs.

EDUCATION

CERTIFICATE OF FINANCIAL PLANNING
Georgetown University, Washington, D.C.

BACHELOR OF ARTS IN BIOLOGY AND ECONOMICS
University of Virginia, Charlottesville, VA

MASTER OF ARTS IN ECONOMICS
Stanford University, Stanford, CA

CERTIFICATIONS

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

MEMBERSHIPS

Financial Planning Association
DACOR Bacon – Board Member
St. Vincent de Paul

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