



**STEPHEN THOMPSON**  
CERTIFIED FINANCIAL PLANNER™  
MASTER OF ARTS IN ECONOMICS

Stephen Thompson is a Financial 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 develops, coordinates and implements his clients' comprehensive cross-border and domestic financial plans and services. He brings substantial international experience to his position.

Prior to joining KeatsConnelly, Stephen 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 two 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 House Foundation – Chair, Education Committee  
St. Vincent de Paul – Member, Investment Committee  
Calgary-Phoenix Sister Cities Committee - Past Chairperson

#### KeatsConnelly Offices

3336 North 32nd Street, Suite 100 | Phoenix, AZ 85018 | T: (602) 955-5007  
1880 North Congress Avenue, Suite 302 | Boynton Beach, FL 33426 | T: (561) 659-7401  
1400, 350-7th Avenue SW | Calgary, Alberta T2P 3N9 | T: (403) 290-0026

[www.keatsconnelly.com](http://www.keatsconnelly.com)