



NEWS

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PETER EICKELBERG JOINS KEATS, CONNELLY AND ASSOCIATES

Keats, Connelly and Associates, a financial planning firm with offices in Phoenix and Boca Raton, Fla., specializing in managing the complexities of accumulated wealth and U.S./Canadian cross-border planning, has named Peter Eickelberg as its newest investment officer.

“We are pleased to have someone with Peter’s experience and education joining our team,” said Dale Walters, CPA, PFS, CFP®, chief executive officer for Keats, Connelly and Associates.

Peter will be responsible for research and implementation of investment strategies and investment products. He will also write formal investment policy statements, assist the director of the department with related projects and serve as a client contact. His prior experience includes positions with both Charles Schwab and Aetna Retirement Services in Phoenix.

Peter obtained his bachelor’s degree from Arizona State University and his master’s degree from Northern Arizona University. He is a Chartered Mutual Fund Counselor (CMFC), an Accredited Asset Management Specialist (AAMS) and a Chartered Financial Analyst (CFA).

Peter is a native of Arizona and currently lives in Phoenix. In his free time, he enjoys international travel, playing the guitar and learning foreign languages including Spanish, Portuguese and Korean.

Keats, Connelly & Associates is a financial planning firm with offices in Phoenix and Boca Raton, Florida that was recognized by *CPA Wealth Provider* as the top financial planning firm in the nation. The firm specializes in managing the complexities of accumulated wealth and U.S./Canadian cross-border planning through an integrated approach including: financial, investment, tax, estate and business planning, as well as the detailed management of all financial records and accounts. Keats, Connelly's *fee-only* compensation model enables the company to maintain its philosophy of promoting clients' best interests at all times while avoiding any potential conflict of interest with commissions. For more information on Keats, Connelly & Associates, please visit www.keatsconnelly.com.