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## **KEATSCONNELLY CONCLUDES SUCCESSFUL WORKSHOP SERIES FOR 2012, ANNOUNCES INCREASED SCOPE FOR 2013**

*Cross-Border Living Workshops Gain Popularity, Selling Out in Palm  
Springs and Phoenix*

**Phoenix, AZ – March 8, 2012** -- More than 200 people participated in this year's workshop series presented by 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. The annual workshops focusing on Canadian cross-border living sold out in Phoenix, Arizona and Palm Springs, California and recorded an increased attendance in Naples, and Boca Raton, Florida.

"Each year the attendance at our workshops grows, as more people recognize that they must learn the rules in order to maximize the benefits of a cross-border lifestyle," says Robert Keats, founder of KeatsConnelly. "Due to the tremendous turnout this year, we are already reserving larger rooms at our venues for 2013 to accommodate the increase in workshop participants. We had to turn people away in Phoenix because we simply didn't have the space to accommodate them. We hope to accommodate everyone next year, but still highly encourage reserving a spot early to ensure availability."

Robert Keats is a CERTIFIED FINANCIAL PLANNER™ in both the United States and Canada and author of a Canadian bestseller, *The Border Guide*. Keats provided valuable information to help attendees:

- Get the best of Canadian and U.S. tax systems;
- Buy a U.S. retirement home and see how you may qualify for a U.S. retirement visa;
- Take advantage of Canadian/U.S. dollar exchange rates;
- Learn how you may receive your Canadian RRSP tax-free or nearly tax-free in the U.S.;

- Find out which U.S. investments provide income exempt from U.S. income tax for Canadians;
- Learn why the U.S. may be your best tax haven.

A comprehensive question and answer session followed the presentation at each workshop to address specific questions and individual concerns. All attendees also received copies of all presentation materials, as well as the latest edition of ***The Border Guide***, the definitive guide to cross-border planning.

The 2013 workshop series will begin in January 2013 in Phoenix, AZ. Other workshop locations include Palm Springs, CA, Naples, FL, Boca Raton, FL.

#### **About KeatsConnelly:**

*KeatsConnelly is the largest and most experienced Canada-U.S. cross-border wealth management firm in the United States. We simplify the lives of high net worth Canadians living and working in Canada and the United States by providing complete and customized cross-border tax, financial planning and investment management services that protect their assets and families. With offices in Arizona and Florida, we have the ability to do it all with unmatched cross-border expertise for both business and personal support. For more information, please visit [www.keatsconnelly.com](http://www.keatsconnelly.com).*

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