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# NEWS

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## **ARIZONA, CALIFORNIA AND FLORIDA RANK AS MOST ATTRACTIVE U.S. STATES FOR CANADIANS**

Cross border wealth management expert Robert Keats has named Arizona, California and Florida as top choices for Canadians to retire in, relocate to or visit, in the newest edition of *The Border Guide*, his best-selling book on living and investing on both sides of the Canadian/U.S. border, available through Amazon.com today. Keats also includes Hawaii, Nevada, New York and Washington in his list.

A dual citizen himself and resident of Phoenix, Keats names Arizona a Canadian retirement, relocation and vacationing hotspot for many reasons:

- With clear skies nearly 85 percent of the time, Arizona offers the most sunshine of almost any area in North America.
- With its dry climate, Arizona is excellent for those suffering from arthritis.
- With the Grand Canyon, mountain high country, Sonoran desert and its many man-made reservoirs and lakes, Arizona is one of the most geographically diverse regions in the world.
- With one of the lowest unemployment rates in the country, Arizona offers plenty of opportunity for permanent or part-time employment in all areas of the economy.
- With several airlines now offering non-stop flights to major cities in Canada, Arizona is easier to get to and from than many other U.S. cities.
- With a relatively kind tax regime and special tax credits for Canadian taxes paid, Arizona is a very tax-friendly state to Canadians.

“The most frequently mentioned drawback about Arizona is that if you choose to stay in the Phoenix area during the summer, you face average daily high temperatures of more than 100 degrees,” said Keats. “However, communities such as Prescott offer four distinct seasons and an ambiance not unlike that of a small town in New England. Arizona has it all.”

Like Arizona, California also boasts plenty of sun. Other reasons Canadians choose California include:

- With temperatures varying considerably from the coast to the inland, California has a little bit of something for everyone.
- With the miles of spectacular coastlines, mountains, farmland, vineyards and desert, California is one of the most geographically diverse regions in the world.
- With several airlines offering non-stop flights to major cities in Canada, California is easier to get to and from than many other U.S. cities. It is also accessible by car from Vancouver and Calgary.
- With its strong technology industry, California is a great innovative computer technology center.
- With Disneyland, Hollywood and Big Sur, California boasts some of the nation’s biggest and best man-made attractions.

“The only drawbacks to California are its relatively unfriendly tax environment for Canadians who have assets and income from Canada, and its population, which is greater than all of Canada’s,” said Keats.

Like California, Florida boasts many man-made entertainment attractions such as Disney World, Universal Studios and Cape Kennedy. And like Arizona, Florida boasts mild winters ideal for Canadians sick of all the snow. Other reasons Canadians choose Florida include:

- With a minimal difference between winter and summer, Florida offers a very mild climate.
- With two surprisingly different coasts, the Atlantic and the Gulf, Florida provides miles of unique beaches, islands and keys, as well as all the year-round water sports that go with them.

- With several radio and TV stations broadcasting Canadian news in both French and English, as well as a good distribution of Canadian daily newspapers, the state offers more services to Canadians than any state.
- With no personal income tax and only a small intangible personal property tax, Florida is a very tax-friendly state to Canadians.

“The only complaints about Florida seem to be that it is too crowded – particularly on the Atlantic coasts, and its hurricane season,” said Keats.

In addition to releasing the 8<sup>th</sup> Edition of *The Border Guide*, Keats will also will hold one-day workshops in Arizona, California and Florida focusing on Canadian cross border living. A CERTIFIED FINANCIAL PLANNER™ in both the United States and Canada, Keats will provide valuable information on cross-border currency exchange, U.S. immigration after 9/11, estate planning and investment management.

Advance registration is required, and space is limited. All attendees will receive a copy of all presentation materials as well as the newest edition of *The Border Guide*, the definitive guide in cross border planning. To register for a workshop, please contact Jim Monroe at (800) 678-5007.

### **About *The Border Guide***

*The Border Guide* is written for both Canadians and Americans, regardless of which direction they may be moving or investing across the 49<sup>th</sup> parallel, and is a particularly great resource for: Canadians who are considering some form of permanent or seasonal residency in the United States; Canadians who have resided in the United States for employment and are contemplating returning to Canada; U.S. citizens living in, investing in or moving to Canada; U.S. citizens married to Canadians and vice versa. The book is written to help its readers:

- Avoid getting caught by fluctuations in Canadian currency
- Qualify for old-age and social security benefits on both sides of the border
- Get the best from both the Canadian and U.S. medical systems — without the disadvantages of either
- Buy a retirement home and deduct the mortgage interest from your Canadian tax return
- Receive your Canadian pensions in the U.S. — almost tax-free!
- Make U.S.-based investments that are exempt from U.S. income tax and filing requirements
- Use the new U.S.–Canada Tax Treaty to receive the equivalent of an unlimited capital gains exemption
- Alleviate your tax burden when you return to Canada after an extended stay in the United States

### **About Robert Keats**

Robert Keats is an internationally renowned expert in cross-border financial planning. He has discussed financial matters on the CTV national news and in the *Arizona Republic*, *Chicago*

*Tribune, Financial Post, Los Angeles Times* and many more. He is the publisher of *The Sunbelt Canadian* newsletter and is on the editorial board for the *Canadian Journal of Financial Planning*. Keats is also the founder and president of Keats, Connelly and Associates, an award-winning wealth management firm specializing in managing the complexities of accumulated wealth and U.S./Canadian cross-border planning. For more information on Keats, Connelly and Associates, please visit [www.keatsconnelly.com](http://www.keatsconnelly.com).