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# NEWS

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**KEATS, CONNELLY AND ASSOCIATES NAMED ONE OF ARIZONA'S  
"COMPANIES TO WATCH"  
BY ARIZONA SMALL BUSINESS ASSOCIATION**

Keats, Connelly and Associates, a wealth management firm with offices in Phoenix, Detroit and West Palm Beach, Fla., specializing in managing the complexities of accumulated wealth and U.S./Canadian cross-border planning through an integrated approach, has been named one of Arizona's 2007 "Companies to Watch" by the Arizona Small Business Association.

"We feel that our success and our continued growth is due to our culture of ethics and looking out for our clients' best interest at all times. This has led to tremendously loyal clients and employees," said Dale Walters, CPA, PFS, CFP®, chief executive officer for Keats, Connelly and Associates.

Arizona Companies to Watch is a unique program designed to recognize and celebrate the contribution, innovation and energy of the wide variety of second-stage companies in the state. Because it focuses on the entire state and not specific industries, Arizona Companies to Watch provides an opportunity to paint a realistic picture of a true statewide economy. Since applicants are evaluated on more than growth, the award includes companies that fly below the radar – those not often recognized for the critical differences they make in their industry, their region and their state. All told, the businesses that comprise Arizona Companies to Watch tell a compelling story about the region's economy.

Keats, Connelly and Associates has already experienced a great deal of growth in 2007. In January, the firm purchased Cross Border Tax & Accounting, LLC (CBTA), which serves

clients with international tax concerns and offers a full range of tax planning and preparation in both the United States and Canada.

“Keats, Connelly and Associates serves the high net worth client. With CBTA, we are making the move to address the needs of the middle market client in the cross-border niche,” said Walters.

And in February, the firm also expanded services south, offering cross-border planning for Canadians and Americans moving to Mexico.

“For us, it was a natural fit. Many of our current clients who travel, relocate or purchase real estate on both sides of the U.S./Canadian border are also traveling and buying real estate in Mexico,” said Walters.

### **About Keats, Connelly and Associates**

Keats, Connelly and Associates is a wealth management firm with offices in Arizona, Florida and Michigan. 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 and Associates’ *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 and Associates, please visit [www.keatsconnelly.com](http://www.keatsconnelly.com).