



KEATS, CONNELLY  
and Associates, LLC

**20 Years of Service**

**10<sup>TH</sup> Edition of THE BORDER GUIDE**

***Bridging the Border to  
Your Financial Future<sup>SM</sup>***

## NEWS

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### **Dale Walters Named President of All Star Financial Group**

Keats, Connelly and Associates, LLC, a wealth management firm that assists Canadians and Americans in realizing their dreams of a cross-border lifestyle, is pleased to announce that its chief executive officer and partner Dale Walters, CPA, PFS, IACCP, CFP™, has been named president of the All Star Financial Group, a national association of CPAs who specialize in financial and tax planning for clients with high net worth and/or unique circumstances, including owners of closely-held businesses, athletes, entertainers, creative artists, successful entrepreneurs and others.

Walters has been active in the financial planning industry for more than 30 years. In addition to his role with the All Star Financial Group, he is currently a member of the National Association of Personal Financial Advisors; Financial Planning Association, where he served as past chairman of the International Advisory Council for the Americas; American Institute of Certified Public Accountants, where he serves as a past member of the Personal Finance Specialist Committee; and the Arizona Society of Certified Public Accountants, where he served as past chairman of the Financial Planning Committee. He is also active with Hospice of the Valley and Rotary International.

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He has twice been named one of the top financial advisors in the United States by *Mutual Fund Magazine* and has led the firm to several awards including top CPA firm in the nation by *Wealth Manager Magazine*, Phoenix Chamber of Commerce Impact Award for Company Culture, Better Business Bureau award for Ethics, and Alfred P. Sloan Award for Workplace Flexibility.

**About Keats, Connelly and Associates**

Celebrating its 20<sup>th</sup> anniversary in 2010, Keats, Connelly and Associates, LLC is the largest wealth management firm in the United States specializing in cross-border issues. The firm's focus is to reduce the stress associated with living, investing and working on both sides of the border, while at the same time creating opportunities for very large potential tax savings. The firm'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, please visit [www.keatsconnelly.com](http://www.keatsconnelly.com).

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