



NEWS

CONTACT: ALISON BAILIN
(602) 957-8881

FOR IMMEDIATE RELEASE
JULY 18, 2007

FINANCIAL ADVISOR MAGAZINE RANKS KEATS, CONNELLY AND ASSOCIATES FASTEST GROWING FINANCIAL ADVISOR IN ARIZONA

Keats, Connelly and Associates, a wealth management firm headquartered in Arizona that specializes in managing the complexities of accumulated wealth and U.S./Canadian cross-border planning, has been named the fastest growing financial advisor in Arizona with \$100 million or more assets under management by *Financial Advisor Magazine* in its annual "Top RIA Survey." Last year, Keats grew more than 46 percent, more than any other independent firm in Arizona in any asset category above \$100 million, and well above the mean 25 percent growth of all firms in the survey. Nationally, Keats ranked 24.

"We feel that our success 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.

Financial Advisor's Top RIA Survey is a ranking of independent registered investment advisory firms based in their percent change in assets under advisement between Dec. 31, 2005 and Dec. 31, 2006. Data for the rankings was obtained from questionnaires mailed to independent RIA firms in early 2007. The universe was identified with the help of the Discovery-RIA database maintained by the Financial Information Group of Red Bank in New

Jersey. Additional information was obtained as needed from Form ADVs filed by advisors with the Securities and Exchange Commission. To be eligible, firms has to:

- Be registered with the SEC
- Offer financial planning services
- Have predominately individual clients
- Have at least \$50 million in assets under management
- Be independent

Other Arizona wealth management firms named to the list include Mercer Advisors, Inlign Wealth Management, WealthTrust, Rowland Carmichael Advisors, Hoffman and Hock Inc., Camden Financial Management, Barnes Investment Advisory Inc., Stellar Capital Management, Perspective Financial Services, Win Win Investment Planning,

About Keats, Connelly & 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'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 and Associates, please visit www.keatsconnelly.com.