



NEWS

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FOR IMMEDIATE RELEASE
AUGUST 20, 2007

KEATS, CONNELLY AND ASSOCIATES EXPANDS CAPABILITIES TO OFFER LIFE PLANNING AND FINANCIAL COACHING SERVICES

Keats, Connelly and Associates, an award-winning, Phoenix-based wealth management firm that specializes in managing the complexities of accumulated wealth as well as U.S./Canadian cross-border planning, has partnered with Phoenix-based Financial Conversations®, a firm that provides one-on-one coaching, communication and training programs to advisors in the financial services industry. Together the firms will offer clients an enhanced suite of services that includes both life and financial coaching and counseling.

“For nearly 10 years, our firm has embraced a “life planning” approach, knowing that financial resources are a means to achieving many life goals,” said Dale Walters, chief executive officer of Keats, Connelly and Associates. “With this partnership, we will be able to better assist, counsel and coach our clients in the articulation and development of their life and financial goals.”

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.