



NEWS

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JUAN HERNANDEZ JOINS KEATS, CONNELLY AND ASSOCIATES

Keats, Connelly and Associates, a wealth management firm with offices in Arizona and Florida specializing in managing the complexities of accumulated wealth and U.S./Canadian cross-border planning, has named Juan Hernandez its newest financial planner.

“We are pleased to have someone with Juan’s experience and education joining our team,” said Dale Walters, CPA, PFS, CFP®, chief executive officer for Keats, Connelly and Associates.

Hernandez will be responsible for drafting financial plans, client relations and creating overall enhancements to financial planning and tax preparation processes. His prior experience includes positions with Beneficial Financial Group and Motorola.

Hernandez obtained his bachelor’s and master’s degrees from Arizona State University. He is a member of the National Association of Insurance & Financial Advisors, the vice president of the board of directors for the Gilbert Education Foundation, a leadership development graduate for the Mexican American Legal Defense & Education Trust Fund and a recipient of a Motorola Silver Quill Award. Hernandez lives in Gilbert and enjoys reading and most outdoors sports including golf and boating.

Keats, Connelly & Associates is a wealth management firm with offices in Arizona and Florida that was recognized by *CPA Wealth Provider* as the top financial planning firm in the nation. 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 & Associates, please visit www.keatsconnelly.com.