

NEWS

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KEATS, CONNELLY AND ASSOCIATES, LLC NAMED 2009 IMPACT AWARD WINNER

Keats, Connelly and Associates, LLC, a Phoenix-based wealth management firm with approximately \$200 million under advisement that assists Canadians and Americans in realizing their dreams of a cross-border lifestyle, has been awarded the Greater Phoenix Chamber of Commerce's Impact Award for Company Culture.

With help from their "Employee Experience Committee," Keats, Connelly and Associates assist its employees from across the globe in creating a work/life balance. Benefits include flex time, telecommuting, health benefits and tuition assistance.

"From life coaching to self defense and CPR training, we try to continually offer our staff a chance to grow both personally and professionally," said Dale Walters, CPA, PFS, CFP®, chief executive officer for Keats, Connelly and Associates.

The Impact Award program honors businesses that have made a difference through community involvement, innovation, response to adversity and company culture. A luncheon event to celebrate Keats, Connelly and Associates as well as the nine other honorees – Advantage Urgent Care, Integrity Tree Service, O'Neil Printing, Orchard Medical Consulting, Sitewire Marketspace Solutions, Telesphere, Tri-Light Builders, Western National Bank and World Egg Bank – was held on May 20 at the Arizona Biltmore Resort & Spa.

About Keats, Connelly and Associates

Keats, Connelly and Associates, LLC is the largest wealth management firm in the United States specializing in cross-border issues. With offices in Arizona, Florida and Michigan, 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.

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