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# NEWS

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## **KEATS, CONNELLY AND ASSOCIATES OPENS WEST PALM BEACH LOCATION**

Wealth management firm Keats, Connelly and Associates, which specializes in managing the complexities of accumulated wealth and the unique niche of U.S./Canadian cross-border planning, has opened an office in West Palm Beach, Fla. The firm's new office is located at 250 S. Australian Ave. The phone number is 561.659.7401 and its web address is [www.keatsconnelly.com](http://www.keatsconnelly.com).

Keats, Connelly and Associates was recently honored as the top financial planning firm in the nation by *CPA Wealth Provider Magazine* and as a top advisory firm by *Wealth Manager Magazine*.

“There are more than 53 million crossings between Canada and the United States each year,” said 20-year tax and financial services veteran David Levine, CA, CPA, who will be heading up the West Palm Beach office. “Our job is to both help Canadian and U.S. citizens alike manage their finances in the on both sides of the border.”

### **About Keats, Connelly and Associates:**

Keats, Connelly and Associates is a wealth management firm with offices in Arizona and Florida that 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](http://www.keatsconnelly.com).