



KEATS, CONNELLY
and Associates, LLC

*Bridging the Border to
Your Financial Future*

NEWS

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ROBERT KEATS CONTRIBUTES TO *THE TRUSTED ADVISOR'S SURVIVAL KIT*

Keats, Connelly and Associates, LLC is pleased to announce its president and co-founder, finance expert Robert Keats, RFP (CDA), CFP™ (CDA), CFP® (U.S.), MSFP, as a contributor to *The Trusted Advisor's Survival Kit*, which is available at www.exitwithsuccess.com.

The book, which is meant to be a reference for accountants, financial and investment advisors, lawyers, business owners, corporate executives and financial media across north America, gives its readers the wisdom of more than 40 experts from all areas of tax, estate, legal, and financial consulting. The book's aim is to help its readers:

- Recognize where law, accounting, tax, insurance, and pensions overlap;
- Build a team of seasoned professionals to create individualized solutions for clients;
- Combine individual pension plans with the most advanced investment methods for maximum tax savings;
- Select the right employee benefits to protect clients' firms, employees and families;
- Underwrite insurance policies to minimize future litigation; and
- Grow and sell businesses for top dollar.

Contributors including Keats also share personal stories and insights from advising extremely successful entrepreneurs and executives. Keats contributed to more than one chapter, but offers the most advice in Part VIII, a chapter dedicated to offshore investing.

Keats, a dual citizen of the United States and Canada, has been working in the financial industry in both Canada and the United States since 1976. He is a member of the Canadian Arizona Business Council and the author of *The Border Guide*, which is considered the definitive cross-border financial tool for Canadians living, working and investing in the United States. The 10th edition of the *Border Guide* will be released in coming months.

For more information about *The Trusted Advisor's Survival Kit*, please visit www.exitwithsuccess.com.

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