



NEWS

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KEATS, CONNELLY AND ASSOCIATES ADDS MEXICO TO ITS CROSS BORDER PLANNING

Keats, Connelly and Associates, a wealth management firm in Phoenix specializing in managing the complexities of accumulated wealth and U.S./Canadian cross-border planning, has expanded its services to offer cross border planning for Canadians and Americans moving to Mexico.

“For us, it was a natural fit. Many of our current clients who travel, relocate or purchase real estate on both sides of the U.S./Canadian border are also traveling and buying real estate in Mexico,” said Dale Walters, chief executive officer of Keats, Connelly and Associates.

In January, Keats purchased Cross Border Tax & Accounting, LLC (CBTA), which serves clients with international tax concerns and offers a full range of tax planning and preparation in both the United States and Canada. The acquisition makes CBTA a wholly-owned subsidiary of Keats, Connelly and Associates.

As part of Keats, Connelly and Associates, CBTA offers financial planning and investment management to its current client base, and it avails Keats the chance to advise a new market of cross border citizens.

“Keats, Connelly and Associates serves the high net worth client. With CBTA, we have moved to address the needs of the middle market client in the cross border niche,” said Walters.

CBTA requires its clients to possess a minimum of \$250,000 in assets to manage, while Keats, Connelly currently requires its client possess over \$1 million in assets.

“Keats, Connelly received over 300 inquiries in 2006, with only 10 percent being potential clients. CBTA will now be able to serve most of that remaining 90 percent,” said Walters.

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.