



NEWS

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KEATS, CONNELLY AND ASSOCIATES OPENS NAPLES OFFICE

Keats, Connelly and Associates, an award-winning wealth management firm that specializes in managing the complexities of accumulated wealth as well as U.S./Canadian cross-border planning, has opened an office in Naples at the Naples Executive Suites, which is located at 5100 Tamiami Trail North, Suite 106, in Naples, Fla.

“This is an extremely exciting time for our company,” said Dale Walters, CPA, PFS, CFP®, chief executive officer for Keats, Connelly and Associates. “We feel that our success has a lot to do with keeping in touch with our niche market. We are expanding to fulfill the increasing demand that is occurring throughout the state of Florida.”

About Keats, Connelly and Associates

Keats, Connelly and Associates is an award-winning 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.