



NEWS

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JON SCHADE JOINS KEATS, CONNELLY AND ASSOCIATES

Keats, Connelly and Associates, a Phoenix-based wealth management firm that specializes in managing the complexities of accumulated wealth as well as U.S./Canadian cross-border planning, has named Jon Schade as its newest staff planner.

“We are pleased to have someone with Jon’s ambition and education joining our team,” said Dale Walters, CPA, PFS, CFP®, chief executive officer for Keats, Connelly and Associates.

Schade will be responsible for assisting clients and managing their comprehensive cross-border and domestic financial planning needs. Schade obtained his degree in accounting from Arizona State University. A Tempe resident, Schade enjoys auto racing and is a high-performance driving instructor.

Keats, Connelly and Associates was recognized earlier this year as the best CPA/Financial Planning Firm in the country by *CPA Wealth Provider Magazine* and was also awarded the 2006 Better Business Bureau (BBB) Business Ethics Award for its commitment to ethical practices in today’s marketplace.

“This is an extremely exciting time for our company,” said Dale Walters, CPA, PFS, CFP®, chief executive officer for Keats, Connelly and Associates, who was recently named one of the “Top Financial Planners in America” by the Consumers’ Research Council of America.

“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 Arizona.”

About Keats, Connelly and Associates

Keats, Connelly and Associates are 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.