



# NEWS

CONTACT: ALISON BAILIN  
(602) 957-8881

FOR IMMEDIATE RELEASE  
JUNE 19, 2008

## **KEATS, CONNELLY AND ASSOCIATES, INC. RECOGNIZED FOR WORKPLACE FLEXIBILITY AND EFFECTIVENESS**

Keats, Connelly and Associates, Inc., a wealth management firm that assists Canadians and Americans in realizing their dreams of a cross-border lifestyle, was named a winner of the 2008 Alfred P. Sloan Award for Business Excellence in Workplace Flexibility today, distinguishing the employer as a leading practitioner of workplace flexibility in Arizona and across the nation.

The Alfred P. Sloan Awards for Business Excellence in Workplace Flexibility are awarded as part of the *When Work Works* project, an ongoing initiative of Families and Work Institute, the Institute for a Competitive Workforce, an affiliate of the U.S. Chamber of Commerce, and the Twiga Foundation. Through *When Work Works*, these partner organizations provide research, resources, and recognition to employers nationwide, and share the results of research on creating effective and flexible workplaces that meet the needs of the 21<sup>st</sup> century.

The Sloan Awards recognize organizations that are dedicated to making work “work” for both the employer and the employees. Representing employers of all sizes and all types, winners of this prestigious award not only offer excellent workplace flexibility practices, but they also use flexibility as a strategic business tool to enhance organizational effectiveness while also benefiting employees.

Keats, Connelly & Associates was honored for several of its employee benefits including flexible work hours, telecommuting, job sharing, paid time off, continuing education, retirement plans and more.

“We understand that in order to offer our clients the best service possible, we needed to create an environment that attracts and retains our number one asset, employees. We can only

attract and retain talented and motivated employees if we provide a flexible work environment.” said Dale Walters, CPA, PFS, CFP<sup>®</sup>, Chief Executive Officer of Keats, Connelly and Associates.

“Employers must develop new recruitment and retention policies. Unprecedented conditions -- a multi-generational workforce, a shrinking labor pool and an increasing demand for skilled workers -- dictate that they do so,” said Greg Roth, Senior Manager of Workforce Education Programs for the U.S. Chamber of Commerce’s Institute for a Competitive Workforce.

Applications for the Alfred P. Sloan Awards were open to all organizations in Arizona with more than 10 employees that had been in business for at least one year. Applicants were evaluated in a rigorous two-step process, first comparing the employer’s application to nationally representative data from Families and Work Institute’s *National Study of Employers*, and then corroborating the employer responses through a survey of employees.

“Sloan Award winners have put into practice their bold ideas about how to make work work in the 21<sup>st</sup> century, and they have shown how they can support the needs of their employees while also making their organizations more effective and successful,” said Ellen Galinsky, president of Families and Work Institute. Each of the 2008 Sloan Award winners will also be recognized nationally, including a full-page congratulatory ad in *USA Today*, and will be featured in the next issue of the *Guide to Bold New Ideas for Making Work Work*, published by Families and Work Institute.

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

Keats, Connelly and Associates, a wealth management firm with offices in Arizona, Florida and Michigan, that assists Canadians and Americans in realizing their dreams of a cross-border lifestyle. The firm’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).

### **About When Work Works**

*When Work Works* is a nationwide initiative to highlight the importance of workforce effectiveness and workplace flexibility as strategies to enhance businesses’ competitive advantage in the global economy and yield positive business results. *When Work Works* is a project of Families and Work Institute in partnership with the Institute for a Competitive Workforce, an affiliate of the U.S. Chamber of Commerce, and the Twiga Foundation, with funding provided by the Alfred P. Sloan Foundation. For more information, visit [www.whenworkworks.org](http://www.whenworkworks.org).

