



*Bridging the Border to
Your Financial Future*

NEWS

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FOR IMMEDIATE RELEASE
JUNE 11, 2009

KEATS, CONNELLY AND ASSOCIATES, LLC RECOGNIZED WITH SLOAN AWARD FOR MAKING WORK “WORK” IN TODAY’S ECONOMY

Keats, Connelly and Associates, LLC, a wealth management firm that assists Canadians and Americans in realizing their dreams of a cross-border lifestyle, has been named a winner of the 2009 Alfred P. Sloan Award for Business Excellence in Workplace Flexibility, 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 the 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 21st century.

Keats, Connelly and 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®, Chief Executive Officer of Keats, Connelly and Associates.

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The Sloan Awards recognize organizations that are striving to find new ways to make work “work” in today’s challenging economy. 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.

“The *When Work Works* project was developed in response to decades of research that found that, simply put, work was not ‘working’ for many businesses and employees as well as it could be,” said Ellen Galinsky, president of Families and Work Institute and co-director of the national *When Work Works* initiative. “In a time of economic volatility, increasingly complicated jobs and an aging workforce, the importance of the Sloan Awards is greater than ever as a tool to create workplace flexibility that can benefit employers and employees alike.”

Keats, Connelly and Associates, along with the other 2009 winners, will be recognized nationally and will be featured in the 2009 issue of the *Guide to Bold New Ideas for Making Work Work*, published by the Families and Work Institute.

About Keats, Connelly and Associates

Keats, Connelly and Associates, LLC is the largest wealth management firm in the United States specializing in cross-border issues. With offices in Arizona, Florida and Michigan, the firm’s focus is to reduce the stress associated with living, investing and working on both sides of the border, while at the same time creating opportunities for very large potential tax savings. 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, please visit www.keatsconnelly.com.

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