



*Bridging the Border to  
Your Financial Future<sup>SM</sup>*

**20 Years of Service**  
**10<sup>TH</sup> Edition of *THE BORDER GUIDE***

## NEWS

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### **KEATS, CONNELLY AND ASSOCIATES 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 2010 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. It is the firm’s third consecutive year earning the honor.

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 21<sup>st</sup> 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.

**About Keats, Connelly and Associates**

Celebrating its 20<sup>th</sup> anniversary in 2010, 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](http://www.keatsconnelly.com).

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