



KEATS, CONNELLY
and Associates, LLC

*Bridging the Border to
Your Financial Future®*

NEWS

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KEATS, CONNELLY AND ASSOCIATES' WAYNE TIBBETTS EARNS PFS DESIGNATION

Keats, Connelly and Associates, LLC, a wealth management firm with approximately \$265 million under advisement that assists Canadians and Americans in realizing their dreams of a cross-border lifestyle, is pleased to announce that Wayne Tibbetts, CPA, its director of Tax Services, has earned a Personal Financial Specialist (PFS) designation from the American Institute of Certified Public Accountants (AICPA).

The PFS program and designation allows CPAs to demonstrate their knowledge and expertise in personal financial planning. Whether a CPA specializes in personal financial planning with his/her clients or interacts with other financial planning professionals, the PFS credential adds credibility. PFS credential holders have a specific experience, education and examination requirement that sets them apart from other CPAs and financial planners.

Tibbetts, who also holds a Master of Science degree in Taxation and Master of Business Administration, respectively, has been working in the tax and financial services industries since 1986. He joined Keats, Connelly in 1997 and assists clients with their tax planning and tax preparation of U.S. and Canadian tax returns. He also acts as director of Tax Services for the firm's sister company, Cross Border Tax & Accounting.

About Keats, Connelly and Associates

Keats, Connelly and Associates, LLC is the largest wealth management firm in the United States specializing in U.S.-Canada 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.