



NEWS

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ROBERT KEATS AND DALE WALTERS NAMED TWO OF AMERICA'S TOP FINANCIAL PLANNERS

Robert Keats and Dale Walters, who are the president and CEO of Keats, Connelly and Associates, respectively, a wealth management firm that specializes in managing the complexities of accumulated wealth as well as U.S./Canadian cross-border planning, have been named two of the "Top Financial Planners in America" by the Consumers' Research Council of America.

Consumers' Research Council of America is an independent research company based in Washington, D.C., that evaluates professional services throughout America. The selection process is based on a point system that awards points for education, years in practice, and affiliations with professional associations and organizations. No fees, sponsorships, donations or advertising are accepted from financial planners, CPA's or any financial institution to ensure an unbiased selection.

Since 1976, Keats, who is a dual citizen of the United States and Canada, has been helping clients manage the complexities of U.S./Canadian cross-border planning when they are considering permanent or seasonal moves across the border. He is also the author of *The Border Guide*, the definitive guide to cross-border financial planning. Presently in its eighth edition, the book is a Canadian bestseller.

This is Walters', a two-decade veteran of the industry, second year in a row being named to this list. In addition to this award, Walters is also a recent recipient of the Reuters Top Advisor Award. Walters is also the president of Cross Border Tax and Accounting (CBTA), which is wholly owned by KCA, and serves on the board of directors as the ethics director for the Greater

Phoenix Financial Planning Association, as the treasurer of the Foreign Committee on Foreign Relations and on the board of directors of the New Song Center for Grieving Children.

In addition to this, Keats, Connelly and Associates received Honorable Mention as one of the top CPA/Financial Planning Firms in the country by *CPA Wealth Provider Magazine*.

About Keats, Connelly and Associates

Keats, Connelly and Associates is 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.