



KEATS, CONNELLY
and Associates, LLC

20 Years of Service

10th Edition of THE BORDER GUIDE

*Bridging the Border to
Your Financial FutureSM*

NEWS

CONTACT: ALISON BAILIN
abailin@hmapr.com
602-957-8881

FOR IMMEDIATE RELEASE
OCTOBER 1, 2010

Keats, Connelly and Associates Adds United Kingdom to its Cross Border Planning

Keats, Connelly and Associates, LLC, a wealth management firm that assists Canadians and Americans in realizing their dreams of a cross-border lifestyle, has expanded its services to offer cross border tax planning for citizens of both the United States and United Kingdom living, investing and/or working in both countries.

“For us, it is a natural fit. With a shared language, increased direct flights and the current real estate opportunities throughout both countries, we are expecting a surge in U.K. citizens who will need these services and vice versa,” said Dale Walters, CPA, PFS, CFP[®], Chief Executive Officer of Keats, Connelly and Associates.

Among the new service offerings are:

- Completion and submission of U.K. and U.S. tax returns;
- Tax planning for U.S. and U.K. taxes and their interaction;
- Advice for beneficiaries of U.K. trusts and estates;
- Information about U.K. indirect taxes (e.g. VAT);
- Advice on tax repercussions on sales of real property;
- Will preparation and estate planning advice for individuals with assets in both countries;
- Recommended strategies for transfers of business between United States and United Kingdom on emigration;
- Advice on residence and domicile issues as well as subsequent liability to tax in both countries;

3336 North 32nd Street, Suite 100

Phoenix, AZ 85018-6241

Phone: 602.955.5007 ☐ Facsimile: 602.224.5874

Renaissance Commons • 1880 N. Congress Ave.

Suite 302 • Boynton Beach, FL 33426

Phone: 561.659-7401 ☐ Facsimile: 561.659-7089

www.keatsconnelly.com

- Resolution of U.K. tax investigations
- Advice on the U.S./U.K. tax treaties;
- Tax planning on pre-arrival/departure;
- Workshops and seminars covering any of these issues; and
- Publications for sale on tax issues for U.K. citizens residing in the United States.

Effective October 1, Keats, Connelly and Associates purchased Transatlantic Tax, which serves clients with international tax concerns and offers a full range of tax planning and preparation in both the United States and United Kingdom, from owner Mary-Heather Styles, who will stay on with the firm. The acquisition makes Transatlantic Tax a wholly-owned subsidiary of Keats, Connelly and Associates.

Styles brings more than 10 years of experience at Transatlantic Tax to the firm. She has also lived and worked in both the United States and United Kingdom and is an English barrister who has specialized in tax law for more than 25 years.

“The tax legislation in the United States and the United Kingdom are among the most sophisticated and complicated in the world, reflecting the societies in which they operate,” said Styles. “There are many occasions when taxpayers need advice from someone who understands both systems.”

About Keats, Connelly and Associates

Celebrating its 20th anniversary in 2010, Keats, Connelly and Associates, LLC is the largest wealth management firm in the United States specializing in cross-border issues. 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.

-30-

3336 North 32nd Street, Suite 100

Phoenix, AZ 85018-6241

Phone: 602.955.5007 ☐ Facsimile: 602.224.5874

Renaissance Commons • 1880 N. Congress Ave.

Suite 302 • Boynton Beach, FL 33426

Phone: 561.659-7401 ☐ Facsimile: 561.659-7089

www.keatsconnelly.com