



NEWS

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DALE WALTERS HONORED BY ARIZONA FAMILY COLLEGE SAVINGS PLAN COMMITTEE

Dale Walters, CPA, PFS, CFP[®], Chief Executive Officer of Keats, Connelly and Associates, a Phoenix-based wealth management firm specializing in managing the complexities of accumulated wealth and U.S./Canadian cross-border planning, has been honored for his outstanding leadership during his tenure as committee chair for the Arizona Family College Savings Plan Oversight Committee (AFCSP) during a special dinner given in his honor on April 24. Walters served on the committee for more than nine years.

AFCSP is a college savings plan sponsored by the state of Arizona that is designed to help families meet the rising cost of education. The committee works on improving Arizona's 529 Plan, which is a tax-advantaged savings plan designed to encourage saving for future college costs. Through Dale's leadership, the Arizona 529 Plan was transformed from one of the country's worst plans to a well respected one.

In addition to this honor, Walters was recently named to the "Top Advisors 2008" list by Reuters Advice Point, and Keats, Connelly was named one of the top financial planning firms in the nation by *CPA Wealth Provider Magazine*

Walters has been active in the financial planning industry for over 25 years. He currently serves as Ethics Director on the board of the Financial Planning Association, in addition to serving as board President for New Song for Grieving Children. Walters is also a member of Rotary International, Rotary 100 (Phoenix) chapter and serves as its International Outreach Chairman.

A four-time world heavyweight karate champion and fourth-degree black belt in Judo, Walters lives in northeast Phoenix with his wife, Charlene, and their two children.

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.