



*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 NAMED TOP WEALTH MANAGEMENT FIRM FOR 10TH CONSECUTIVE YEAR**

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 one of the top wealth management firms in the country by *Wealth Manager Magazine*, as part of its 10th Annual Top Wealth Manager (formerly “Top Dog”) Report. The firm has been honored each year since the list’s inception.

According to *Wealth Manager*, to be considered firms must be registered independent advisors with their own IARD/CRD numbers and must offer financial planning services. Additionally, at least half of each of the firm’s clients must be high net worth individuals as defined by the SEC.

“There are many outstanding wealth management firms across the nation, and we are honored to be included among them,” said Dale Walters, CPA, PFS, CFP®, Chief Executive Officer for Keats, Connelly and Associates. “We feel that our success is due to our culture of ethics and looking out for our clients’ best interest at all times. This has led to tremendously loyal clients and 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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