



NEWS

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KEATS, CONNELLY AND ASSOCIATES PROMOTES J. BRADFORD FLECKE TO SENIOR STAFF PLANNER

Keats, Connelly and Associates, a Phoenix-based wealth management firm with more than \$225 million under advisement that assists Canadians and Americans in realizing their dreams of a cross-border lifestyle, is pleased to announce that in addition to his role as in-house legal counsel, J. Bradford Flecke, has been promoted to senior staff planner.

As senior staff planner, he will be responsible for the supervision of staff planners and associate planners, as well as assuming responsibility for a number of U.S. and Canadian clients.

“As Keats, Connelly and Associates prepares to expand and relocate our Florida office from West Palm Beach to a bigger suite in Boynton Beach, we are thrilled to see Brad take on more responsibilities,” said Dale Walters, CPA, PFS, CFP®, chief executive officer for Keats, Connelly and Associates. “He has proven to be a great asset to our team, and will continue to do outstanding work as legal counsel and also in his new role.”

Flecke received his Juris Doctor from American University and his Bachelor of Arts in International Relations from the College of William & Mary. He just received his Certified Financial Planner (CFP) designation and is a member of the Financial Planning Association, District of Columbia Bar, Florida Bar and American Immigration Lawyers Association.

About Keats, Connelly and Associates

Keats, Connelly and Associates, a wealth management firm with offices in Arizona, Florida and Michigan, that assists Canadians and Americans in realizing their dreams of a cross-border lifestyle. 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 on Keats, Connelly and Associates, please visit www.keatsconnelly.com.