



NEWS

CONTACT: ALISON BAILIN
(602) 957-8881

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SALLY A. TAYLOR APPOINTED KEATS, CONNELLY AND ASSOCIATES DIRECTOR OF FINANCIAL PLANNING

Keats, Connelly and Associates, an award-winning, wealth management firm that specializes in managing the complexities of accumulated wealth as well as U.S./Canadian cross-border planning, has named Scottsdale resident Sally A. Taylor, CPA, PFS, as its newest director of financial planning. Taylor will also hold the title of senior planner. She will be responsible for the overall supervision of the financial planning department, as well as performing comprehensive financial planning services for U.S. and Canadian clients.

Taylor received her Master of Science in Financial Planning from the College for Financial Planning and her Bachelor of Arts in Accountancy from John Carroll University. She is a member of the American Institute of Certified Public Accountants, the Arizona Society of Certified Public Accountants, the Financial Planning Association and the Central Arizona Estate Planning Council.

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.