



KEATS, CONNELLY  
and Associates, LLC **20 Years of Service**  
**10<sup>TH</sup> Edition of THE BORDER GUIDE**

*Bridging the Border to  
Your Financial Future<sup>SM</sup>*

## NEWS

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### **KEATS, CONNELLY AND ASSOCIATES OFFICE NOW SOLAR, PAPERLESS**

Keats, Connelly and Associates, LLC, a wealth management firm that assists Canadians and Americans in realizing their dreams of a cross-border lifestyle, is pleased to announce that as part of its 20<sup>th</sup> anniversary celebration it has gone green by installing solar panels across its roof, reducing its power consumption by 58.8%. The entire solar program is tied to a computer system and is backed up by a natural gas generator.

“When talking about ways to celebrate our 20<sup>th</sup> anniversary, the subject of giving back – both to our clients and to our own community – kept coming up,” said Robert Keats, RFP (CDA), CFPTM (CDA), CFP® (U.S.), MSFP, president and co-founder of Keats, Connelly and Associates. “Going green seemed a natural fit. Plus, if we are saving on our costs, we are able to pass that savings on to our clients as well.”

In addition, the firm recently installed an energy-efficient cooling system and is now almost 100% paperless by enhancing its use of electronic files.

“Once we added the solar panels, it was a natural next step to add the cooling system. The new cooling system vents used air to our courtyard and saves us 60% of the energy that we used to spend on direct cooling costs to cool the building. As the office cools, the warmer air rises through vents that lead to the courtyard, which in turn reduces the temperature in the courtyard – and the

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temperature in the office,” said Dale Walters, CPA, PFS, CFP®, chief executive officer for Keats, Connelly and Associates.

The firm welcomes its clients and colleagues to see the new green implementations themselves via a digital display in the office that shows how much power the office is generating at any given time. Keats estimates the offices green makeover will reduce their power consumption by half or more, even throughout the hot Arizona summer.

### **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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