



**FOR IMMEDIATE RELEASE**  
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Contact:  
Ania Kubicki  
Angles Public Relations  
E: [ania@anglespr.com](mailto:ania@anglespr.com)  
T: (480) 477-8686

## **KeatsConnelly Announces the 2012 Series of U.S./Canadian Cross-Border Living Workshops**

*Workshops Offer Key Information for Maximizing Cross-Border Lifestyle*

**Phoenix, AZ – January 06, 2012** -- Robert Keats, founder and president of KeatsConnelly, the largest cross-border wealth management firm in North America that specializes in helping Canadians and Americans realize their dreams of a cross-border lifestyle, will hold a series of one-day workshops across the country focusing on Canadian cross-border living. A CERTIFIED FINANCIAL PLANNER™ in both the United States and Canada and author of a Canadian bestseller, *The Border Guide*, Keats will provide valuable information to help you:

- Get the best of Canadian and U.S. tax systems;
- Buy a U.S. retirement home and see how you may qualify for a U.S. retirement visa;
- Take advantage of Canadian/U.S. dollar exchange rates;
- Learn how you may receive your Canadian RRSP tax-free or nearly tax-free in the U.S.;
- Find out which U.S. investments provide income exempt from U.S. income tax for Canadians;
- Learn why the U.S. may be your best tax haven.

A general question and answer session will follow each presentation to address specific concerns.

Advance registration is required as space is limited. Attendees will receive copies of all presentation materials, as well as the latest edition of *The Border Guide*, the definitive guide to cross-border planning.

### **When/Where:**

**Phoenix / Thursday, January 26, 2012**  
The Ritz-Carlton  
2401 East Camelback Road  
Phoenix, AZ 85016

**Palm Springs / Tuesday, January 31, 2012**  
Rancho Las Palmas Resort  
41000 Bob Hope Drive  
Rancho Mirage, CA 92270

**Naples / Tuesday, February 7, 2012**

The Ritz-Carlton  
280 Vanderbilt Beach Road  
Naples, FL 34108

**Boca Raton / Thursday, February 9, 2012**

Boca Raton Resort & Club  
501 E. Camino Real  
Boca Raton, FL 33432

**Time:** 7:30 a.m. – Registration and Continental Breakfast  
8:00 a.m. to Noon -- Workshop Presentation  
12:15 p.m. – Lunch

**Who:** Ideal for Canadians wintering regularly in the U.S. sun belt who are purchasing or already own U.S. real estate or are contemplating a retirement in the U.S. as a tax reduction strategy.

**Cost:** US\$125 per person or US\$175 per married couple

**Register:** You can register on our website at [www.keatsconnelly.com](http://www.keatsconnelly.com) or call us at 800-678-5007

**About KeatsConnelly:**

*KeatsConnelly is the largest and most experienced Canada-U.S. cross border wealth management firm in the United States. We simplify the lives of high net worth Canadians living and working in Canada and the United States by providing complete and customized cross-border tax, financial planning and investment management services that protect their assets and families. With offices in Arizona and Florida, we have the ability to do it all with unmatched cross-border expertise for both business and personal support. For more information, please visit [www.keatsconnelly.com](http://www.keatsconnelly.com).*

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