



HMA PUBLIC RELATIONS

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CALENDAR ITEM

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FOR IMMEDIATE RELEASE
NOVEMBER 10, 2009

WHAT: Workshop on U.S./Canadian Cross-Border Living

Robert Keats, founder and president of Keats, Connelly and Associates LLC, a local wealth management firm that assists Canadians and Americans in realizing 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 on:

- Best work strategies with the Canadian and U.S. tax systems;
- Buying a retirement home and deducting mortgage interest from your Canadian return;
- Taking advantage of Canadian/U.S. dollar exchange rates;
- Receiving your Canadian RRSPs tax-free or nearly tax-free in the United States;
- Finding investments exempt from U.S. income taxes and withholdings; and
- Maximize Medicare benefits.

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

Advance registration is required as space is limited. All attendees will receive a copy of all presentation materials, as well as the newest edition of *The Border Guide*, the definitive guide in cross-border planning.

WHEN/WHERE: **Tuesday, January 26, 2010**
The Ritz-Carlton
2401 E. Camelback Road
Phoenix, Arizona 85016

Tuesday, February 2, 2010
Rancho Las Palmas Resort & Spa
41000 Bob Hope Drive
Rancho Mirage (Palm Springs), California 92270

Tuesday, February 9, 2010

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

Thursday, February 11, 2009

The Ritz-Carlton
100 S. Ocean Boulevard
Manalapan (Palm Beach), Florida 33462

- TIME:** 7:30 a.m. – Registration and continental breakfast
8 a.m. to Noon – Workshop
12:15 p.m. – Lunch
- WHO:** Ideal for Canadians wintering regularly in the U.S. Sun Belt, purchasing or already own U.S. real estate or contemplating a retirement in the U.S. as tax reduction strategy.
- COST:** \$125 per person or \$175 per married couple (U.S. dollars)
- RSVP:** Please contact Martha Mendoza at (800) 678-5007 to register.

About Keats, Connelly and Associates

Keats, Connelly and Associates, LLC is the largest wealth management firm in the United States that specializes 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.

About The Border Guide

The Border Guide is written for both Canadians and Americans, regardless of which direction they may be moving or investing across the 49th parallel, and is a particularly great resource for: Canadians who are considering some form of permanent or seasonal residency in the United States; Canadians who have resided in the United States for employment and are contemplating returning to Canada; U.S. citizens living in, investing in or moving to Canada; U.S. citizens married to Canadians and vice versa. www.theborderguide.com.