



**KEATS, CONNELLY**  
*and Associates, LLC*

*Bridging the Border to  
Your Financial Future*

## NEWS

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FOR IMMEDIATE RELEASE  
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### **KEATS, CONNELLY AND ASSOCIATES, LLC NAMED TOP CPA/FINANCIAL PLANNING FIRM IN THE UNITED STATES**

Keats, Connelly and Associates, a Phoenix-based wealth management firm specializing in managing the complexities of accumulated wealth and U.S./Canadian cross-border planning, has been named a top CPA/Financial Planning Firm in the United States by *CPA Wealth Provider's* Sixth Annual Financial Planning Awards program. It is Keats, Connelly and Associates second win in the past four years, and it is the only firm listed from the Southwest.

The firm is being recognized for its leadership through innovation, efficiency, initiative and growth in the financial planning field.

“There are many outstanding CPA/financial planning firms, so we are very honored to win this award for a second time,” said Dale Walters, CPA, PFS, CFP®, chief executive officer for Keats, Connelly and Associates. “We feel that our success is due to our culture of ethics and looking out for our clients' best interest at all times. This has led to tremendously loyal clients and employees.”

A panel of judges representing the chief editors of *CPA Wealth Provider*, *Accounting Today*, *Practical Accountant*, and *Accounting Technology* chose the Sixth Annual Financial Planning Awards recipients in the areas: best overall CPA/financial planning firm, best overall broker/dealer and best overall financial planning software vendor.

In addition to this honor, Keats, Connelly and Associates is currently a finalist for the Greater Phoenix Chamber of Commerce Impact Award and was recognized in 2008 as one of the top wealth management firms in the country by *Wealth Manager Magazine* as part of its Eighth Annual Wealth Manager “Top Dog” report.

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The firm was also presented an Award in 2007 for Excellence in Corporate Volunteerism for companies with 50 or fewer employees for its ongoing commitment to the community and named “Company to Watch” by the Arizona Small Business Association.

**About Keats, Connelly and Associates**

Keats, Connelly and Associates, LLC is 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, please visit [www.keatsconnelly.com](http://www.keatsconnelly.com).

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