



KEATS, CONNELLY
and Associates, LLC

*Bridging the Border to
Your Financial Future*

NEWS

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KEATS, CONNELLY AND ASSOCIATES NAMES FOUR TO PARTNER

Keats, Connelly and Associates, a local wealth management firm that assists Canadians and Americans in realizing their dreams of a cross-border lifestyle, is pleased to announce four new partners: J. Bradford Flecke, JD, CFP[®] (U.S.), who will continue to serve the firm as a senior planner and in-house attorney; David Levine, CPA, CA who will continue to serve the firm as its international tax manager; Sally Taylor, CFP[®] (U.S.), CPA, MSFP, PFS, who will continue to serve the firm as its director of financial planning and senior planner; and Kristin Martin, REGISTERED PARAPLANNER[™] who will continue to serve the firm as an investment assistant.

This announcement aligns with the company's plans to transition ownership of the firm to a handful of employees gradually over the next nine years. The deal will allow next-generation employees to take out loans from Fiduciary Network, LLC of Dallas to purchase equity from the business' principals, Bob Keats, RFP (Canada), CFP[™] (Canada), CFP[®] (U.S.), MSFP, and Dale Walters, CPA, PFS, CFP[™] (Canada), CFP[®] (U.S.), as they approach retirement.

“As Bob and I began looking into succession plans, we were approached by a number of banks and various business roll-up firms proposing merger and acquisition deals,” said Walters. “However, none of these deals ever spelled out how they would benefit our employees or our clients. With this model in place, some of our current employees will gradually become the new owners, and there will be no affect on our clients or customer service. It is a win-win situation and a major morale booster, especially in this economy.”

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.