



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

*Bridging the Border to  
Your Financial Future*

## NEWS

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### **JOHN RICE JOINS CFA SOCIETY OF SOUTH FLORIDA BOARD OF DIRECTORS**

Keats, Connelly and Associates, LLC, a wealth management firm with approximately \$200 million under advisement that assists Canadians and Americans in realizing their dreams of a cross-border lifestyle, is pleased to announce John Rice, a staff planner in the firm's Florida office who holds a Chartered Financial Analyst® designation and is a CERTIFIED FINANCIAL PLANNER™ professional, has joined the CFA Society of South Florida's Board of Directors. His duties will include overseeing a mentor program he recently launched for the organization.

Rice, who also holds a Masters in Business Administration from Arizona State University, is also a member of the CFA Institute and has been assisting clients with their investments since 1992. Rice joined the Florida office from the Arizona branch, where he worked since 2000.

The CFA Society of South Florida is a member driven organization of financial professionals dedicated to the highest standards of professional competence and integrity. The Society, a non-profit organization founded in 1971, serves the investment community and its members by promoting active participation in Society programs and events and by providing useful tools to advance personal and professional development among members. For more information, please visit [www.cfasouthflorida.org](http://www.cfasouthflorida.org).

#### **About Keats, Connelly and Associates**

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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