



KEATS, CONNELLY
and Associates, LLC

*Bridging the Border to
Your Financial Future*

NEWS

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CLAUDIA FREEMAN APPOINTED TO INTERNATIONAL FOUNDATION FOR RETIREMENT EDUCATION BOARD

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 the firm's own Claudia Freeman, CFP® (US & Canada), CRC®, MBA, who is a staff planner in the firm's Detroit office, has been appointed to the Board of Standards & Policy Development for the International Foundation for Retirement Education (InFRE). The InFRE is a 501(c)(3) organization that assists retirement counselors and administrators in increasing retirement preparedness among American workers.

Freeman has been working and teaching in the financial industries of Canada and the United States since 1985. At Keats, Connelly and Associates, she assists clients and manages their comprehensive cross-border and domestic financial plans.

For more information about the International Foundation for Retirement Education, please visit www.infre.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.

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