



KEATS, CONNELLY
and Associates, LLC

*Bridging the Border to
Your Financial Future*

NEWS

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ROBERT KEATS APPOINTED TO NATIONAL ADVISORS TRUST COMPANY 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 the firm's own Robert Keats, RFP (CDA), CFP™ (CDA), CFP® (U.S.), MSFP, who is president and co-founder of the company, has been appointed to the National Advisors Trust Company (NATC) Board of Directors, a federally chartered trust company that supports trusted advisors and their clients with independent, objective trust and custodial solutions. The NATC was founded by independent, innovative financial advisory firms to serve their clients. Keats, Connelly and Associates is a founding member of the organization.

Keats, a dual citizen of the United States and Canada, has been working in the financial industry in both Canada and the United States since 1976. He is a member of the Canadian Arizona Business Council and the author of *The Border Guide*, which is considered the definitive cross-border financial tool for Canadians living, working and investing in the United States.

For more information about the NATC, please visit www.nationaladvisortrust.com.

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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