



KEATS, CONNELLY
and Associates, LLC

*Bridging the Border to
Your Financial Future*

NEWS

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KEATS, CONNELLY AND ASSOCIATES EXPANDS, RELOCATES FLORIDA OFFICE

Keats, Connelly and Associates, LLC (KCA), 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 it has relocated and expanded its Florida office to the Renaissance Commons at 1880 N. Congress Ave. in Boynton Beach.

A grand opening reception is being held at the new office for KCA clients, the community and the media on Thursday, March 26 from 5:30 p.m. to 7:30 p.m. Special guest Consul General of Canada in Miami Marcy Grossman will be in attendance and available for interview as will KCA co-founder and president Robert Keats, CFP® (U.S.), CFP™ (Canada). Keats, who a dual citizen of Canada and the United States as well as the author of *The Border Guide*, a best-selling book on living and investing on both sides of the Canadian/U.S. border, will have signed copies of the Canadian bestseller on hand for guests.

“For many businesses and for the entire country, 2008 was fraught with adversity. With the financial markets in chaos, advisors have lost 20 percent or more of their revenue. We, however, have had a 10 percent increase and are working hard to maintain if not increase our success in 2009,” said Keats. “We continue to excel and grow by maintaining a strong focus on servicing our clients and spending more time and money on marketing and employee growth.”

KCA originally opened its Florida location in Boca Raton in 2005. Quickly outgrowing the space, KCA expanded in 2006 and moved the office to West Palm Beach. Now in an office with more than 3,000 square feet in Boynton Beach, the team is ready to expand further while offering its clients a more central location. KCA also has an executive suite in Naples to meet with clients, which is located at 5100 Tamiami Trail North, Suite 106, as well as offices in Phoenix and Detroit. The firm is also looking to expand internationally by opening a Canadian office. KCA sees opportunity in duplicating its formula for cross-border planning and starting a branch of the firm for clients who travel between the U.S. and U.K. borders too.

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About Keats, Connelly and Associates, LLC

Keats, Connelly and Associates, LLC is an award-winning 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 on Keats, Connelly and Associates, please visit www.keatsconnelly.com.

About The Border Guide

The Border Guide is written for both Canadians and Americans, regardless of which direction they may be moving or investing across the 49th parallel, and is a particularly great resource for: Canadians who are considering some form of permanent or seasonal residency in the United States; Canadians who have resided in the United States for employment and are contemplating returning to Canada; U.S. citizens living in, investing in or moving to Canada; U.S. citizens married to Canadians and vice versa. The book is written to help its readers:

- Avoid getting caught by fluctuations in Canadian currency;
- Qualify for old-age and social security benefits on both sides of the border;
- Get the best from both the Canadian and U.S. medical systems — without the disadvantages of either;
- Buy a retirement home and deduct the mortgage interest from your Canadian tax return;
- Receive your Canadian pensions in the U.S. — almost tax-free;
- Make U.S.-based investments that are exempt from U.S. income tax and filing requirements;
- Use the new U.S.–Canada Tax Treaty to receive the equivalent of an unlimited capital gains exemption; and
- Alleviate your tax burden when you return to Canada after an extended stay in the United States.

About Robert Keats

Robert Keats, RFP (CDA), CFPTM (CDA), CFP[®] (US), MSFP, is an internationally renowned expert on cross-border financial planning. He is a contributing editor to *Canadian MoneySaver*, and his articles have been featured in the *L.A. Times*, the *Globe and Mail* and the *National Post*. Keats began his financial planning career in 1976 and is president and major shareholder of the largest financial advisory firm specializing in Canada-United States cross-border financial planning, Keats, Connelly and Associates, which has offices in Arizona, Florida and Michigan. For more information, please visit www.keatsconnelly.com.

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