



*Bridging the Border to  
Your Financial Future<sup>SM</sup>*



**MR. JOHN E. RICE**  
CHARTERED FINANCIAL ANALYST®  
CERTIFIED FINANCIAL PLANNER™ (U.S.)  
MASTER OF BUSINESS ADMINISTRATION

John is a Staff Planner at Keats, Connelly and Associates, a Phoenix-based *Fee-Only*<sup>\*</sup>, wealth management firm that helps Canadians and Americans realize their dreams of a cross-border lifestyle. He assists clients and manages their comprehensive cross-border and domestic financial plans from our Boynton Beach, Florida office.

John is on the board of the CFA Society of South Florida. He is a member of the Financial Planning Association's Global Advisory Council. Both are volunteer groups that promote professionalism in the financial community. John has been quoted in Smart Money magazine, CBS Marketwatch, Research Magazine and other publications. Recent speaking engagements include Vistage International and investment conferences with Information Management Network.

John has been helping individuals and families achieve their financial goals for 18 years. He is a soccer coach with American Youth Soccer Organization and has participated in volunteer work with Habitat for Humanity, CFA Institute and the Financial Planning Association.

#### **EDUCATION**

MASTER OF BUSINESS ADMINISTRATION, 1997  
Arizona State University, Tempe, Arizona

BACHELOR OF SCIENCE DEGREE IN PSYCHOLOGY, 1989  
University of Arizona, Tucson, Arizona

#### **CERTIFICATIONS**

CERTIFIED FINANCIAL PLANNER™, 2000  
Certified Financial Planner Board of Standards, Inc.

CHARTERED FINANCIAL ANALYST®, 2007  
CFA Institute

#### **MEMBERSHIPS**

Financial Planning Association  
CFA Institute

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