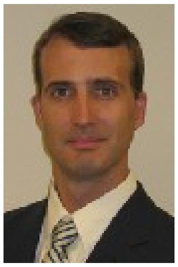
Keats, Connelly
and Associates, LLC

Bridging the Border to Your Financial Future℠



Mr. Peter M. Eickelberg
Chartered Financial Analyst®
Master of Arts

Peter is Senior Investment Officer at Keats, Connelly and Associates, a Phoenix-based, *Fee-Only** wealth management firm specializing in assisting Canadians and Americans realize their dreams of a cross-border lifestyle. In addition to overseeing the firm's investment operations and communications, he directs investment research and chairs the investment committee, which selects the strategies and investments for clients' cross-border and domestic portfolios.

After leaving behind a career in teaching English that included a year-long stint in South Korea, he transitioned to financial services and has worked as a stock broker and research professional in addition to his present position with Keats, Connelly. Past designations held include the NASD (now FINRA) Series 6, 63, and 7 licenses, and the Chartered Mutual Fund Counselor℠ (CMFC®) and Accredited Asset Management Specialist℠ (AAMS®) certifications. Peter brings over eleven years of licensed experience dealing with securities to the role and holds the Chartered Financial Analyst® (CFA) designation.

The CFA designation demonstrates professional achievement. To earn the CFA charter, investment professionals must have at least four years of acceptable professional experience in the investment decision-making process. In addition, candidates must pass three sequential, six-hour examinations over at least three years and must commit to abide by and annually reaffirm their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Education
Master of Arts with distinction, TESL/Applied Linguistics, 1998
Northern Arizona University, Flagstaff, Arizona

Bachelor of Arts cum laude, English, 1994
Arizona State University, Tempe, Arizona

Certifications
Chartered Financial Analyst®, 2004
CFA Institute, Charlottesville, Virginia

Memberships
Phoenix CFA Society – Past President and current board member

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