



JOHN E. RICE, CHIEF INVESTMENT OFFICER
CHARTERED FINANCIAL ANALYST®
CERTIFIED FINANCIAL PLANNER™ (US)
MASTER OF BUSINESS ADMINISTRATION

John is the Chief Investment Officer at KeatsConnelly, the largest cross-border wealth management firm in North America specializing in helping Canadians and Americans realize their dreams of a cross-border lifestyle. John is responsible for the strategic investment policy, research, and recommendations to all clients in the US and in Canada, as well as overseeing all investment related operations and communications. He is also chairperson of the firm's US and Canadian Investment Committees.

John is Past President of the CFA Society of South Florida. He served four years on the CFA South Florida board of directors while working as a Senior Planner out of the firm's Boynton Beach office. He also taught economics and quantitative analysis in the Chartered Financial Analyst® preparatory programs at Florida Atlantic University in Boca Raton, Florida. John currently works out of our headquarters in Phoenix.

John has been quoted in SmartMoney, MarketWatch, and Research magazines as well as other publications. Past speaking engagements include the Financial Planning Association's Gold Coast Chapter, Vistage International, and investment conferences with Information Management Network. John has been helping individuals and families achieve their financial goals for over 20 years.

EDUCATION

Master of Business Administration, 1997
Arizona State University, Tempe, Arizona

Bachelor of Science Degree in Psychology, 1989
University of Arizona, Tucson, Arizona

CERTIFICATIONS

Chartered Financial Analyst®, 2007
CFA Institute

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

MEMBERSHIPS

Financial Planning Association
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