



KAREN ROGERS SIM
CHARTERED PROFESSIONAL ACCOUNTANT
CERTIFIED GENERAL ACCOUNTANT
ENROLLED AGENT

Karen Rogers Sim is a Senior Tax Associate at Cross Border Tax & Accounting, whose parent is KeatsConnelly, the largest cross-border wealth management firm in North America that specializes in helping Canadians and Americans realize their dreams of a cross-border lifestyle. Karen works out of our Phoenix, Arizona office, and is responsible for the preparation of US and Canadian tax returns.

Before joining Keats Connelly, Karen worked in public accounting practices in Saskatchewan and Alberta, as well as a tax practice in Scottsdale Arizona. Karen, husband, Paul and their three children moved from Alberta to Florida in 2001. Karen used her brief time without US work authorization to study for and pass her CPA examinations.

Karen enjoys swimming, reading, music and wine-making. Whenever possible, she and Paul visit their grandchild in Toronto and other family in Canada.

EDUCATION

University of Ottawa, 1982-1983

Certified General Accountant

Certified General Accountants of Ontario and Saskatchewan, 1983 - 1987

CERTIFICATIONS

Chartered Professional Accountant, Certified General Accountant, 1987

Certified General Accountants of Saskatchewan

Certified Public Accountant, 2002

Certified Public Accountants of Vermont

Enrolled Agent, 2008

US Department of the Treasury, Office of Professional Responsibility

MEMBERSHIPS

Chartered Professional Accountants of Alberta

National Association of Enrolled Agents

Central Arizona and North Phoenix Associations of Enrolled Agents