



Miller Wealth Advisors

Planning for life. Preparing for a lifetime.



William C. Miller

Miller Wealth Advisors, LLC
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This Brochure Supplement provides information about William C. Miller, Independent Investment Advisor Representative, which supplements the Valmark Advisers, Inc. (“Valmark”) Form ADV Part 2A Brochure. Please inform William C. Miller at the contact information listed above if you did not receive Valmark’s Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement. Additional information about Valmark and William C. Miller is available on the SEC’s website at www.adviserinfo.sec.gov and FINRA’s website at www.finra.org/brokercheck.

Educational Background and Business Experience

William C. Miller

- Date of Birth: 1/14/1966

Education:

- B.A., Brandeis University

Examinations and Professional Designations:

- Series 6 – Investment Company Products/Variable Contracts Limited Representative
- Series 7 – General Securities Representative
- Series 24 – General Securities Principal
- Series 63 – Uniform Securities agent State Law Exam
- Series 65 – Investment Advisor Law Exam
- CLU® – Chartered Life Underwriter®
- ChFC® – Chartered Financial Consultant®
- CFP® – CERTIFIED FINANCIAL PLANNER™
- AEP® – Accredited Estate Planner®

Business Experience:

- Managing Partner & Wealth Adviser, Miller Wealth Advisors, LLC, 2006 - Present
- Registered Representative, Valmark Securities, Inc., 2006 – Present
- Investment Advisory Representative, Valmark Advisers, Inc., 2006 - Present

CLU® – Chartered Life Underwriter®

The CLU® designation is offered and recognized by the American College. Candidates must complete five core and three elective courses, and successfully pass a proctored exam for each course. Additionally, 3 years of full-time business experience within the 5 years preceding the awarding of the designation is required. Every 2 years, 30 hours of continuing education credits are required.

ChFC® – Chartered Financial Consultant®

The ChFC® designation is issued by the American College. To earn the professional designation, candidates must complete six core courses and two elective courses and successfully pass a proctored final exam for each course. Candidates must also have at least 3 years of full-time business experience within the 5 years preceding being awarded the designation. Every 2 years, 30 hours of continuing education credits are required.

CFP® – CERTIFIED FINANCIAL PLANNER™

The CFP® designation is offered and recognized by the Certified Financial Planning Board of Standards, Inc. Candidates must have a bachelor's degree (or higher) from an accredited college or university and at least 3 years of full-time personal financial planning experience. Certificants must complete a CFP®-board registered program or hold one of the following designations; CPA, ChFC®, CLU®, CFA®, Ph.D. in business or economics, Doctor of Business Administration, or an Attorney's License. Certificants must also successfully pass a 2-day comprehensive examination and complete 30 hours of continuing education credits every 2 years.

AEP® – Accredited Estate Planner®

The AEP® designation is offered and recognized by the National Association of Estate Planners & Councils. To earn the AEP®, candidates must meet all of the following requirements: a) be an attorney (JD), accountant (CPA), insurance professional and financial planner (CLU®/ChFC®, CFP®), or trust officer, b) be in good standing with their professional organization and not be subject to disciplinary investigation, c) have a minimum of 5 years of experience in estate planning in one or more of the prerequisite professions, d) have completed two graduate level courses administered by The American College or by another accredited graduate program as part of a master's or doctoral degree unless applicant has 15 or more years of experience as an estate planner, and d) pass a final examination for each course. Those who obtain the AEP® must complete 30 hours of continuing education every 2 years, including 15 hours in estate planning. Re-certification is required annually.

Disciplinary Information

Registered Investment Advisers are required to disclose material facts regarding any investment related legal or disciplinary events, including issues involving criminal or civil actions, findings resulting from administrative proceeding before the SEC, a self-regulatory body or any other federal or state regulatory authority that would be material to your evaluation of each supervised person providing investment advice.

William C. Miller has no disciplinary record that would impact a client's evaluation of the practice.

Other Business Activities

William C. Miller is a Registered Representative of Valmark Securities, Inc., a broker dealer under common ownership and management of Valmark Advisers, Inc.

William C. Miller is also a licensed insurance advisor affiliated with Executive Insurance Agency, Inc., an agency under common ownership and management of Valmark Advisers, Inc.

Additional Compensation

As a Registered Representative of an affiliated broker dealer, Valmark Securities, Inc., William C. Miller is eligible to receive normal commissions associated with securities sales.

William C. Miller is also eligible to receive insurance commissions surrounding the sales of insurance products sold through the affiliated insurance agency, Executive Insurance Agency, Inc.

Supervision

William C. Miller is an independent investment advisor representative. However, before accepting and implementing investment strategies recommended, supervisory principals at the Valmark home office review and approve of the investment strategies. Accounts are reviewed periodically, usually at least annually by the independent advisor. The home office compliance team also periodically reviews accounts and strategies. These initial and ongoing reviews are under the direction of OSJ Principal, Judson Forner, who may be reached at 330-576-1234 to discuss questions or concerns in connection with the internal compliance program.