



Miller Wealth Advisors

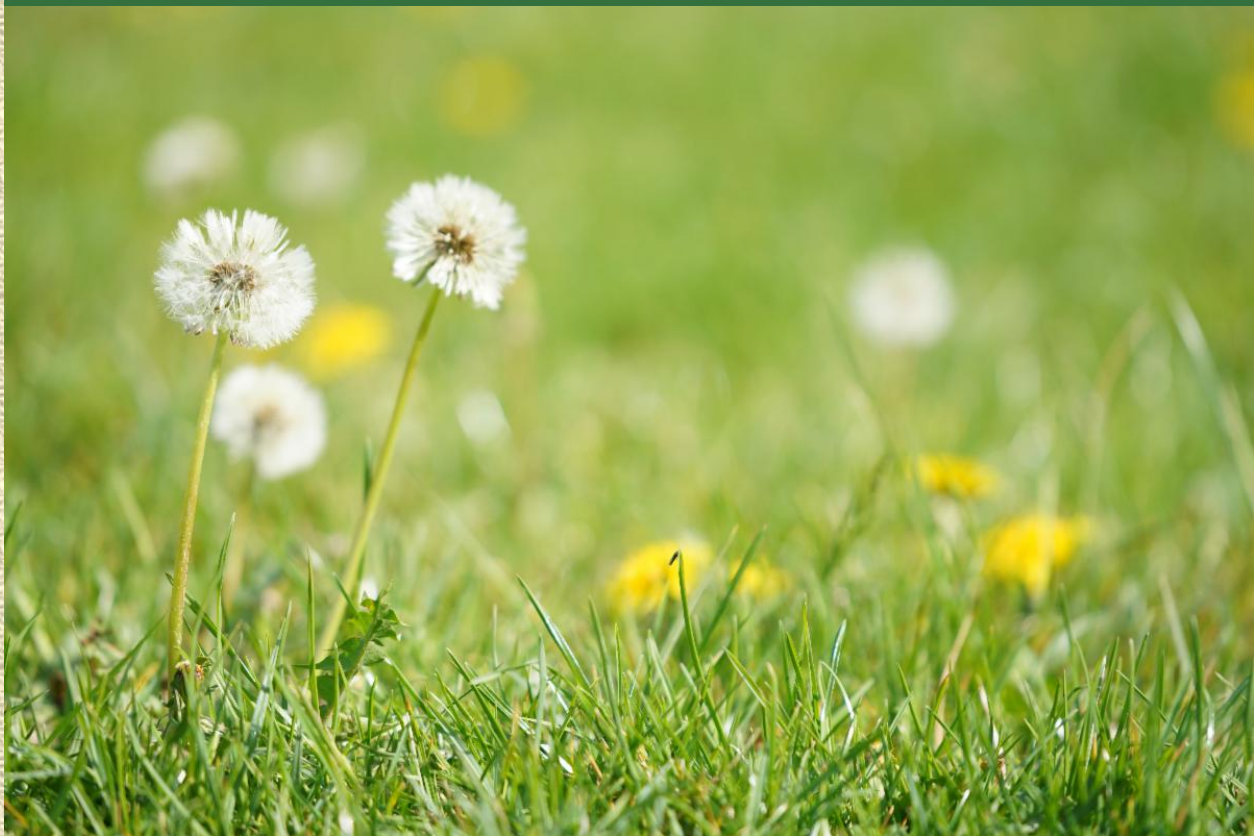
Planning for life. Preparing for a lifetime.

About
Us

Visit Our Website

The MWA Report

Spring 2023



Dear Clients, Advisors and Friends,

I hope you and your loved ones are well, staying healthy and enjoying the awakening of Spring. We've been hard at work to improve your client experience. In January, we sent out a client survey and appreciate all those who participated. We are pleased to report that 97% of you indicated that you are getting value from working with us. In addition, 87% indicated that you have made excellent or very good progress towards your financial goals.

Then in February, we upgraded our website to make it easier to navigate our wide range of planning services and product offerings. Please check it out at millerwealthadvisors.com.

In March, two US regional banks, California-based Silicon Valley Bank and New York's Signature Bank, collapsed under the weight of heavy losses in their bond portfolios and a massive run on deposits. Fortunately, the Federal Reserve provided relief amidst the fallout and averted a major crisis.

Within this edition, you will find a case study about an alternative long term care planning strategy, a brief on the recent banking crisis, a quarterly economic commentary, and an excerpt from a dinner in which I was honored for my efforts in securing legacy gifts for my community.

I encourage you to share this newsletter with anyone who may find it to be of value. I hope you enjoy it!

Warm regards,

Bill

Case Study, Volume 124



Retiree Needs Long Term Care Coverage But Is Uninsurable

In this case study, we highlight a specialty annuity product that satisfies an uninsurable client's need for long term care.

Bill's Brief



Recent Bank Failures

In this brief, we explain the recent regional bank failure of SVB and its likely impact on the economy and overall markets.

Bill's
Brief

Quarterly Economic Commentary



First Quarter, 2023

The first quarter began with investors feeling largely upbeat. Inflation appeared to be subsiding, and many bet that would lead the Federal Reserve to switch quickly from raising interest rates to cutting them.

Community Impact Corner

*"We make a living by what we get, but we make a life by what we give."
-Winston Churchill*

On February 9th, I was honored by the Jacobson Jewish Community Foundation (JJCF) Professional Advisory Committee (PAC) for my service and efforts to secure legacy gifts for our community. The annual Irving Eckhardt Mitzvah Society Celebration took place at Farmer's Table in Boca Raton. I was especially grateful to have some of my family, friends and colleagues present to share in this memorable night. Here is an excerpt from The Boca Observer and a picture of the MWA team from the event.

FLASH



Michelle Hollister, Dan Seigel, Bill Miller and Bryan Drowos



Rachel Miller, Jeffrey Miller, Ellie Fertel, Bill Miller and Tanya Miller

PHOTOS BY JEFFREY THOLL



Dan Seigel



Bill Miller



Bryan Drowos, Mark Schaum, Bill Miller and Larry Blair

Jewish Federation Of South Palm Beach County Honors Bill Miller

THE PROFESSIONAL ADVISORY COMMITTEE (PAC) at the Jacobson Jewish Community Foundation at the Jewish Federation of South Palm Beach County recently honored Bill Miller for his outstanding service to the community at its annual Irving Eckhardt Mitzvah Society Celebration.

Miller is the Managing Partner of Miller Wealth Advisors. He has been an active member of the Jacobson Jewish Community Foundation Professional Advisory Committee (PAC) since 2015. He has co-chaired events and was a member of the first class of PAC University in 2020. Miller was initially inducted into the Irving Eckhardt Mitzvah Society in 2016 and has since worked with numerous clients to secure legacy commitments for the community.



Dan Seigel, Bill Miller and Michelle Hollister



Elise Gross and Bryan Drowos



David Lappin, Erik Modansky, Michelle Hollister, Bryan Drowos, Elise Gross, Joshua Goldglantz, David Katzman, Timothy Wolf, Dan Seigel and Kenneth Pritzker



Securities offered through Valmark Securities, Inc. Member FINRA, SIPC // Investment Advisory Services offered through Valmark Advisers, Inc., an SEC Registered Investment Advisor 130 Springside Drive, Suite 300, Akron, OH 44333 Tel 800-765-5201

Miller Wealth Advisors, LLC is a separate entity from Valmark Securities, Inc. and Valmark Advisers, Inc. Unless otherwise noted, Valmark Securities, Inc. and Valmark Advisers, Inc. are not affiliated, associated, authorized, endorsed by, or in any way officially connected with any other company, agency or government agency identified or referenced in this document. //

CONFIDENTIALITY NOTICE. Information contained in this email to the named addressee is confidential. If the recipient of this email is not the named addressee, the recipient should immediately notify the sender and destroy the information transmitted without making a copy or distribution thereof.

Miller Wealth Advisors

Office: 561-613-0130

Fax: 561-613-0128

1001 W. Yamato Rd
Suite 306
Boca Raton, FL 33431

Connect With Us:



[Client Login](#)

Miller Wealth Advisors | 1001 W Yamato Rd, Suite 306, Boca Raton, FL 33431

[Unsubscribe krystjana@millerwealthadvisors.com](mailto:krystjana@millerwealthadvisors.com)

[Update Profile](#) | [Constant Contact Data Notice](#)

Sent by bill@millerwealthadvisors.com powered by



Try email marketing for free today!