



**Miller Wealth Advisors**

Planning for life. Preparing for a lifetime.

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## The MWA Report

### Summer 2023



Dear Clients, Advisors and Friends,

As of this writing, we are in the throes of the dog days of summer. This summer has been challenging, as sweltering heat has blanketed most of the country. However, there are also many benefits to the warm weather. Many of us take advantage of this time of year to visit with friends and family or enjoy some quiet time relaxing by the pool.

In this Summer edition of our newsletter, you will find a briefing on the key attributes of a broker, investment adviser and financial planner; a case study about a business owner who sells his company and then restructures his life insurance; a mid-year economic commentary; a reminder about the transition from TD Ameritrade to Charles Schwab for select clients; and some photos of Bill's recent trip to Italy with his wife Tanya.

For the past few months, Fed Chief Jerome Powell has stressed the importance

of getting inflation under control. Meanwhile, investors were encouraged by the promise of artificial intelligence (AI) on society. AI is a burgeoning industry that primarily falls under the technology umbrella. While we are excited about this technology and the benefits it can provide, we are not making an outsized bet on AI as there are still a lot of questions to be answered.

We hope you enjoy the rest of your summer. As always, if you have any questions or wish to discuss something, please give us a call. We encourage you to share this newsletter with anyone who may find it to be of value.

Warm regards,

**Bill**

## Case Study, Volume 125



### **Insurance Portfolio Restructure Improves Coverage**

In this case study, we highlight a need for additional life insurance

coverage, as well as policy reviews for existing coverage.

Case Study

## Bill's Brief



### Broker, Investment Adviser or Financial Planner

In this brief, we explain the differences between a broker, adviser and financial planner covered at our annual seminar luncheon for CPAs, estate attorneys and trust officers in June.

Bill's  
Brief

## Quarterly Economic Commentary



### Second Quarter, 2023

The second quarter witnessed a continued upward trajectory for equity

markets, driven by positive economic data, improving corporate earnings and accommodative monetary policies.

Economic Commentary



## Important Announcement For TDAmeritrade Clients

TD Ameritrade accounts are moving to Schwab. Here's what you need to know.

**June** - Clients impacted should have received notices about the transition.

**August** - Clients impacted will receive a letter that includes their new account(s) numbers and how to login to the new Schwab Alliance website.

**September** - Accounts will be fully transferred by Labor Day Weekend.

Please reach out to our team if you have any questions.

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### What's Happening With Our Team?

In May, Bill and his wife Tanya vacationed in Italy for two weeks. They visited Rome, Florence, Siena and San Gimignano during the first week. For the second week, they explored the southern region of Puglia, at the heel of the boot along the Adriatic Sea. They stayed near Fasano and took day trips to Lecce, Alberobello and Matera. Here are a few pictures from their memorable trip.

*Viva La Italia!*





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