Miller Wealth Advisors

Planning for life. Preparing for a lifetime.

About Us

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The MWA Report

Winter 2024

Dear Clients and Friends,

Welcome to the Winter Edition of our client newsletter. In this issue, discover five key insights to investing in the new year, why the strength of the US dollar matters and potential newfound money in your term life insurance policy.

In addition, see how our team supported this year's Walk to End Alzheimer's and spent their free time over the holidays.

Let's dive into the latest happenings and trends that will keep you informed and engaged.

As always, thank you for the trust you've placed in me and my team to help steer you toward achieving financial prosperity.

Warm regards,

Bill

Quarterly Economic Commentary

Fourth Quarter, 2023

What a difference a year makes. At the start of 2023, market pessimism was widespread, investors braced for a recession, and many expected another down year in stocks. Now with the index teetering near record highs, the sentiment is much more optimistic.

Economic Commentary

Bill's Brief

Why The Strength Of The U.S. Dollar Matters

There are many things to consider when investing in stocks.
But some people forget to keep an eye on the dollar.

Bill's Brief

Case Study, Volume 127
Life Settlement Offer

Getting a second opinion on his life settlement offer more than doubled his initial offer.

Case Study

Dual Form 1099's for clients transitioned from TD Ameritrade to Charles Schwab

For those clients transitioned from TDAmeritrade to Schwab, you will be receiving two Form 1099s for your accounts:

- One from TDAmeritrade-for pre-conversion reportable activity
- One from Schwab-for post-conversion reportable activity

Delivery of both forms will follow your paperless preferences for Form 1099s. if you are enrolled for paperless delivery, you will receive a notification when your tax forms are available on SchwabAlliance.com, or you will receive tax forms via mail if you have selected to receive paper statements.

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

Community Impact Corner

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

Miller Wealth Advisors was proud to support the Alzheimer's Association and the Boca Raton Walk to End Alzheimer's held at South County Park on Sunday, November 12. Below are photos of our team and family:

What's Happening With Our Team?

An Update from Jennifer

Our family enjoyed another Thanksgiving holiday in the north Georgia mountains. This year was extra special since our new rescue puppy, Winston, came with us and my oldest nephew got engaged at a beautiful winery in Ellijay! The quality time spent with our family in this beautiful setting is something we look forward to each year.

An Update from Bill

After celebrating my wife's 50th birthday on December 21, my family and I traveled to the Montage Palmetto Bluff Resort in Bluffton, SC for some rest, relaxation and southern charm. Despite the dreary weather, we enjoyed morning bike rides, a boat tour along the May River and delicious food. On our drive home, we stopped in Savannah, GA and took a stroll through the historic district and Forsyth Park.

\- **Bill Miller**, Managing Partner

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