



Miller Wealth Advisors

Planning for life. Preparing for a lifetime.

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The MWA Report

Spring 2024



Dear Clients and Friends,

Welcome to our Spring Edition of our client newsletter. As the seasons change, it's the perfect time to rejuvenate your financial plans for long-term stability.

In this issue, you'll read about how stocks had their best first quarter in 5 years, a new SEC rule that will make buying securities faster and more convenient, and five ways to pay for estate taxes.

In early April, the U.S. Labor Department announced an annual inflation rate of 3.5%, up from the previous rate of 3.2%. While many investors are lulled into a sense of security stashing their money in the bank or money market accounts while earning almost 5%, their actual after-tax return on that money may be lagging inflation. With inflation starting to creep up, it's very important for investors to grow their money, so their purchasing power is not eroded.

In the last segment, I share memories from a family trip to France and Spain while visiting my son, Ben, during his semester abroad in Barcelona.

I hope you can take away something of value from this edition. As always, thank you for the trust you've placed in me and my team to steer you toward greater prosperity.

Warm regards,

Bill

Quarterly Economic Commentary



First Quarter, 2024

It was a strong quarter for stocks and a relatively flat one for bonds. According to Bloomberg, stocks had their best first quarter in 5 years. Profits rose 3.1% from a year earlier, as reported by FactSet.

[Economic Commentary](#)

Bill's Brief



Faster T+1 Trade Settlement Cycle Coming in May

Did you know there's a difference between the date you trade a security and the date the transaction settles?

Bill's
Brief

Special Tax Bulletin

Five Ways To Pay For Estate Tax



Strategic Planning Minimizes The Impact of Taxation On The Estate

What's Happening With Our Team?

An Update from Bill

Last month, my wife, daughter and I visited my son, Ben, in Barcelona. We met in Paris for two days, then traveled to the French Riviera, where we settled in Nice for two more days. The final stop on our journey was Barcelona, where we visited prominent works from the famous architect, Antoni Gaudi's, like La Sagrada Familia, Palau (Park) Guell and the houses of Gaudi. Gaudi is best known for his ability to weave nature into his intricate structures. The highlight for me and my wife was seeing how our son adapted to living in a foreign country – traveling to school by train, improving his Spanish and using the language to navigate the region. I hope you enjoy these pictures.







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