



**Miller Wealth Advisors**

Planning for life. Preparing for a lifetime.

About Us

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## The MWA Report

### Summer 2024



Dear Clients and Friends,

Welcome to our summer newsletter. As we bask in the warmth of the season, we are excited to share with you an array of updates affecting your finances.

In this edition, we delve into a compelling case study that highlights how a wealthy business owner reduced her estate tax exposure while retaining control over her assets. Our ever-popular "Bill's Brief" provides a concise overview of a recent Supreme Court case that will have significant impact on many family and closely held businesses that have stock redemption buy-sell plans. Additionally, our economic commentary offers an in-depth analysis of markets and current economic conditions, helping you stay informed and prepared for what lies ahead.

In June, we held our annual seminar for professionals at Seasons 52. This marked our 13<sup>th</sup> year of hosting this event, and the group of CPAs and estate attorneys in attendance were treated to networking, lunch and an informative discussion on the latest developments in financial planning.

In July, I became the President of the Greater Boca Raton Estate Planning Council, a professional organization that includes broad representation from across the estate planning industry. I am excited and honored to lead this esteemed group of attorneys, accountants, financial services professionals, trust and philanthropy officers for the 2024/25 season.

I hope you find this newsletter useful in navigating your own finances. 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



Second Quarter, 2024

Stocks advanced through the 2nd quarter to post strong first-half gains.

Economic Commentary

**Bill's Brief**



## The Supreme Court Has Turned Buy-Sell Planning Upside Down

A recent court case ruling impacts buy-sell arrangements.

[Bill's Brief](#)

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## Case Study

### Optimized Wealth Transfer Planning with SLAT



Enhancing Wealth Transfer Via Privately-Financed Life Insurance

Case Study

## Our 13th Annual Educational Luncheon

On June 20th, we hosted our 13th Annual Educational Luncheon for professionals at Seasons 52. Bill presented on a host of topics and case studies to a group of legal and accounting professionals.

Below are some pictures from this event.



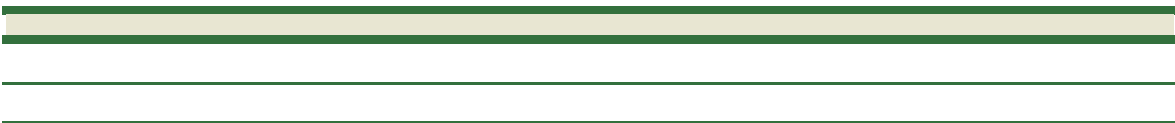


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## What's Happening With Our Team?

An Update from Jennifer

My family and I had the opportunity to travel to Costa Rica for a week in June to celebrate my son's high school graduation. It was our kids' first time traveling to a foreign country, and the experience was very positive for all of us. We stayed in the beautiful Los Suenos Resort on the Pacific coast, which we absolutely loved. The location was perfect for us to enjoy some adventurous outings, including zip lining, an ATV tour and off-shore fishing. This was the first trip we've taken as just our family of four in a very long time, so it was great to spend quality time together and make some incredible memories. Looking forward to many more fun family trips in the years to come!



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