

Firm Brochure

(Part 2A of Form ADV)

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CRD 139249

This brochure provides information about the qualifications and business practices of MILLER FINANCIAL GROUP, LLC. If you have any questions about the contents of this brochure, please contact us at: 503-808-9404, or by Email at: todd@millerfinancial.biz or ben@millerfinancial.biz. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission, or by any state securities authority.

MILLER FINANCIAL GROUP, LLC is a Registered Investment Advisor. The title of "registered investment adviser" does not imply a certain level of skill or training.

Additional information about MILLER FINANCIAL GROUP, LLC is available on the SEC's website at www.adviserinfo.sec.gov.

Jan 1, 2017

Miller Financial Group, LLC

Material Changes

Annual Update

The Material Changes section of this brochure will be updated annually or when material changes occur since the previous release of the Firm Brochure. The previous ADV Part II was dated Jan 1, 2016.

Material Changes since the Last Update

On January 3, 2017, Ben Newell and Todd Newell purchased Miller Financial Group, LLC from Bruce Miller. Bruce will be available to the company as a consultant for the next few years to assure a smooth transition. All clients were notified of the change in ownership either by phone, letter or in person by March 31, 2017.

There have been no other material changes in company operations since the last ADV Part II amendment, dated Jan 1, 2016.

Full Brochure Available

Whenever you would like to receive a complete copy of our Firm Brochure, please contact us by telephone at: 503-808-9404 or by Email at: todd@millerfinancial.biz or ben@millerfinancial.biz.

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Advisory Business

Firm Description

MILLER FINANCIAL GROUP, LLC was founded in 2012. It is a successor to Bruce W Miller dba Miller Financial Group which was founded in 1984. It was purchased by Ben Newell and Todd Newell on January 3, 2017.

MILLER FINANCIAL GROUP, LLC provides personalized confidential financial planning and investment management to individuals, pension and profit sharing plans, trusts, estates, charitable organizations and small businesses. Advice is provided through consultation with the client and may include: determination of financial objectives, identification of financial problems, cash flow management, tax planning, insurance review, investment management, education funding, retirement planning, and estate planning.

MILLER FINANCIAL GROUP, LLC is strictly a fee-only financial planning and investment management firm. The firm does not receive commissions for purchasing or selling annuities, insurance, stocks, bonds, mutual funds, limited partnerships, or other commissioned products. The firm is not affiliated with entities that sell financial products or securities. No commissions in any form are accepted. No finder's fees are accepted.

Investment advice is an integral part of financial planning. In addition, MILLER FINANCIAL GROUP, LLC advises clients regarding cash flow, college planning, retirement planning, tax planning and estate planning.

Investment decisions are made by the investment advisor. On some occasions, client input is taken into account in making investment decisions. MILLER FINANCIAL GROUP, LLC does not act as a custodian of client assets. The client always maintains asset control. MILLER FINANCIAL GROUP, LLC places trades for clients under a limited power of attorney.

A written evaluation of each client's initial situation is provided to the client, often in the form of a net worth statement. Periodic reviews are also communicated to provide reminders of the specific courses of action that need to be taken. More frequent reviews occur, but are not necessarily communicated to the client.

Other professionals (e.g., lawyers, accountants, insurance agents, etc.) are engaged directly by the client on an as-needed basis. Conflicts of interest will be disclosed to the client in the unlikely event they should occur.

The initial meeting, which may be by telephone, is free of charge and is considered an exploratory interview to determine the extent to which financial planning and investment management may be beneficial to the client.

Principal Owners

Ben Newell and Todd Newell are equal owners and principals of the firm. Ben Newell is the Chief Investment Officer and Todd Newell is the Chief Operations Officer.

Types of Advisory Services

MILLER FINANCIAL GROUP, LLC provides investment supervisory services, also known as asset management services; manages investment advisory accounts not involving investment supervisory services; furnishes investment advice through consultations and issues charts, graphs, formulas, or other devices which clients may use to evaluate securities.

On more than an occasional basis, MILLER FINANCIAL GROUP, LLC furnishes advice to clients on matters not involving securities, such as financial planning matters, taxation issues, and trust services that often include estate planning.

MILLER FINANCIAL GROUP, LLC provides a timing service. At certain times the advisor feels that there is a higher degree of risk to the marketplace, the advisor may make allocation changes which might include up to 100% in cash or money market accounts, or other market neutral type of investment products.

As of DEC 31 2016, MILLER FINANCIAL GROUP, LLC manages approximately \$64 Million in assets for approximately 200 clients. All assets are managed on a discretionary basis.

Tailored Relationships

The goals and objectives for each client are documented in our client relationship management system. Investment policy statements are created that reflect the stated goals and objective. Clients may impose restrictions on investing in certain securities or types of securities.

Agreements may not be assigned without written client consent.

Types of Agreements

The following agreements define the typical client relationships.

Financial Planning Agreement

A financial plan is designed to help the client with all aspects of financial planning without ongoing investment management after the financial plan is completed.

The financial plan may include, but is not limited to: a net worth statement; a cash flow statement; a review of investment accounts, including reviewing asset allocation and providing repositioning recommendations; strategic tax planning; a review of retirement accounts and plans including

recommendations; a review of insurance policies and recommendations for changes, if necessary; one or more retirement scenarios; estate planning review and recommendations; and education planning with funding recommendations.

Detailed investment advice and specific recommendations are provided as part of a financial plan. Implementation of the recommendations is at the discretion of the client.

The fee for a financial plan is predicated upon the facts known at the start of the engagement. Since financial planning is a discovery process, situations occur wherein the client is unaware of certain financial exposures or predicaments. Fees are based upon time spent at a rate of \$250 per hour.

In the event that the client's situation is substantially different than disclosed at the initial meeting, a revised fee will be provided for mutual agreement. The client must approve the change of scope in advance of the additional work being performed when a fee increase is necessary.

After delivery of a financial plan, future face-to-face meetings may be scheduled as necessary for up to one month. Follow-on implementation work is billed separately at the rate of \$250 per hour.

Advisory Service Agreement

A client may choose to have MILLER FINANCIAL GROUP, LLC manage their assets in order to obtain ongoing in-depth advice and life planning. All aspects of the client's financial affairs are reviewed, including those of their children. Realistic and measurable goals are set and objectives to reach those goals are defined. As goals and objectives change over time, suggestions are made and implemented on an ongoing basis.

The scope of work and fee for an Advisory Service Agreement is provided to the client in writing prior to the start of the relationship. An Advisory Service Agreement includes: cash flow management; insurance review; investment management (including performance reporting); education planning; retirement planning; estate planning; and tax planning, as well as the implementation of recommendations within each area.

The annual Advisory Service Agreement fee is based on a percentage of the investable assets according to the following schedule:

- 1.60% - on the first \$100,000;
- 1.40% - on the next \$150,000(from 100,001 to 250,000); and
- 1.20% - on the next \$250,000(from 250,001 to 500,000); and
- 1.00% - on the next \$500,000(from 500,001 to 1,000,000); and
- .75% - on the assets above \$1,000,000.

The minimum account size is generally \$100,000. Fees are negotiable. Current client relationships may exist where the fees are higher or lower than the fee schedule above.

Although the Advisory Service Agreement is an ongoing agreement and constant adjustments are required, the length of service to the client is at the client's discretion. Amendment of the agreement without prior written consent is prohibited. The client or the investment advisor may terminate an Agreement by written notice to the other party. At termination, fees will be billed on a pro rata basis for the portion of the quarter completed. The portfolio value at the completion of the prior full billing quarter is used as the basis for the fee computation, adjusted for the number of days during the billing quarter prior to termination.

Hourly Planning Engagements

MILLER FINANCIAL GROUP, LLC provides hourly planning services for clients who need advice on a limited scope of work. The hourly rate for limited scope engagements is \$250.

Asset Management

Assets are invested primarily in no-load or low-load mutual funds and exchange-traded funds, usually through discount brokers or fund companies. Fund companies charge each fund shareholder an investment management fee that is disclosed in the fund prospectus. Discount brokerages may charge a transaction fee for the purchase of some funds.

Stocks and bonds may be purchased or sold through a brokerage account when appropriate. The brokerage firm charges a fee for stock and bond trades. MILLER FINANCIAL GROUP, LLC does not receive any compensation, in any form, from fund companies.

Investments may also include: equities (stocks), warrants, corporate debt securities, commercial paper, certificates of deposit, municipal securities, investment company securities (variable life insurance, variable annuities, and mutual funds shares), U. S. government securities, options contracts, and interests in partnerships.

Initial public offerings (IPOs) are not available through MILLER FINANCIAL GROUP, LLC.

Termination of Agreement

A Client may terminate any of the aforementioned agreements at any time by notifying MILLER FINANCIAL GROUP, LLC in writing and paying the rate for the time spent on the investment advisory engagement prior to notification of termination. If a client does not receive a brochure at least 48 hours prior to entering into the investment advisory agreement, the advisory client has the right to terminate the contract without penalty within five business days. If the

client made an advance payment, MILLER FINANCIAL GROUP, LLC will refund any unearned portion of the advance payment.

MILLER FINANCIAL GROUP, LLC may terminate any of the aforementioned agreements at any time by notifying the client in writing. If the client made an advance payment, MILLER FINANCIAL GROUP, LLC will refund any unearned portion of the advance payment.

Fees and Compensation

Description

MILLER FINANCIAL GROUP, LLC bases its fees on a percentage of assets under management or hourly charges. Refer to Advisory Services Agreement on Page 3 for a schedule of fees.

Financial plan pricing is estimated according to the degree of complexity associated with the client's situation. Fees are on an hourly basis at a rate of \$250 per hour.

Fees are negotiable.

Fee Billing

Investment management fees are billed quarterly, in arrears, meaning that we invoice you after the three-month billing period has ended. Fees are usually deducted from a designated client account to facilitate billing. The client must consent in advance to direct debiting of their investment account.

Other Fees

Custodians may charge transaction fees on purchases or sales of certain mutual funds and exchange-traded funds. These transaction charges are usually small and incidental to the purchase or sale of a security. The selection of the security is more important than the nominal fee that the custodian charges to buy or sell the security.

MILLER FINANCIAL GROUP, LLC, in its sole discretion, may waive its minimum fee and/or charge a lesser investment advisory fee based upon certain criteria (e.g., historical relationship, type of assets, anticipated future earning capacity, anticipated future additional assets, dollar amounts of assets to be managed, related accounts, account composition, negotiations with clients, etc.).

Advisory Service Agreement fees are calculated on a formula basis and may be adjusted for complexity of individual situations.

Expense Ratios

Mutual funds and Electronically Traded Funds (ETFs) generally charge a management fee for their services as investment managers. The

management fee is called an expense ratio. For example, an expense ratio of 0.50 means that the mutual fund company or ETF charges 0.5% for their services. These fees are in addition to the fees paid by you to MILLER FINANCIAL GROUP, LLC.

Performance figures quoted by mutual fund companies in various publications are after their fees have been deducted.

Past due Accounts and Termination of Agreement

MILLER FINANCIAL GROUP, LLC reserves the right to stop work on any financial planning engagements that are more than 60 days overdue. In addition, MILLER FINANCIAL GROUP, LLC reserves the right to terminate any financial planning engagement where a client has willfully concealed or has refused to provide pertinent information about financial situations when necessary and appropriate, in MILLER FINANCIAL GROUP, LLC's judgment, to providing proper financial advice. Any unused portion of fees collected in advance will be refunded within 60 days.

Performance-Based Fees

Sharing of Capital Gains

Fees are not based on a share of the capital gains or capital appreciation of managed securities.

MILLER FINANCIAL GROUP, LLC does not use a performance-based fee structure because of the potential conflict of interest. Performance-based compensation may create an incentive for the adviser to recommend an investment that may carry a higher degree of risk to the client.

Types of Clients

Description

MILLER FINANCIAL GROUP, LLC generally provides investment advice to individuals, pension and profit sharing plans, trusts, estates, or charitable organizations, corporations or business entities.

Client relationships vary in scope and length of service.

Account Minimums

The minimum account size is \$100,000 of assets under management for new accounts and is cumulative of all investment accounts of a family unit.

MILLER FINANCIAL GROUP, LLC has the discretion to waive the account minimum. Accounts of less than \$100,000 may be set up when the client and the advisor anticipate the client will add additional funds to the accounts bringing the total to \$100,000 within a reasonable time. Other exceptions will

apply to employees of MILLER FINANCIAL GROUP, LLC and their relatives, or relatives of existing clients.

Methods of Analysis, Investment Strategies and Risk of Loss

Methods of Analysis

Security analysis methods may include charting, fundamental analysis, technical analysis, and cyclical analysis.

The main sources of information include financial newspapers and magazines, inspections of corporate activities, research materials prepared by others, corporate rating services, timing services, annual reports, prospectuses, filings with the Securities and Exchange Commission, and company press releases.

Other sources of information that MILLER FINANCIAL GROUP, LLC may use include Barrons, Valueline, AAll Research Data, Stock Investor Pro stock information, Standard and Poors Market Research, Briefing.com and various Internet sources.

Investment Strategies

The primary investment strategy used on client accounts is strategic asset allocation utilizing a core and satellite approach. This means that we use passively-managed index and exchange-traded funds as the core investments, and then add actively-managed funds, stocks and bonds where there are greater opportunities to make a difference. Portfolios are globally diversified to control the risk associated with traditional markets.

The investment strategy for a specific client is based upon the objectives stated by the client during consultations. The client may change these objectives at any time. Each client executes an Investment Policy Statement that documents their objectives and their desired investment strategy.

Other strategies may include long-term purchases, short-term purchases, trading, short sales, and margin transactions.

Risk of Loss

All investment programs have certain risks that are borne by the investor. Our investment approach constantly keeps the risk of loss in mind. Investors face the following investment risks:

- **Interest-rate Risk:** Fluctuations in interest rates may cause investment prices to fluctuate. For example, when interest rates rise, yields on existing bonds become less attractive, causing their market values to decline.
- **Market Risk:** The price of a security, bond, or mutual fund may drop in reaction to tangible and intangible events and conditions. This type of

risk is caused by external factors independent of a security's particular underlying circumstances. For example, political, economic and social conditions may trigger market events.

- **Inflation Risk:** When any type of inflation is present, a dollar today will not buy as much as a dollar next year, because purchasing power is eroding at the rate of inflation.
- **Currency Risk:** Overseas investments are subject to fluctuations in the value of the dollar against the currency of the investment's originating country. This is also referred to as exchange rate risk.
- **Reinvestment Risk:** This is the risk that future proceeds from investments may have to be reinvested at a potentially lower rate of return (i.e. interest rate). This primarily relates to fixed income securities.
- **Business Risk:** These risks are associated with a particular industry or a particular company within an industry. For example, oil-drilling companies depend on finding oil and then refining it, a lengthy process, before they can generate a profit. They carry a higher risk of profitability than an electric company, which generates its income from a steady stream of customers who buy electricity no matter what the economic environment is like.
- **Liquidity Risk:** Liquidity is the ability to readily convert an investment into cash. Generally, assets are more liquid if many traders are interested in a standardized product. For example, Treasury Bills are highly liquid, while real estate properties are not.
- **Financial Risk:** Excessive borrowing to finance a business' operations increases the risk of profitability, because the company must meet the terms of its obligations in good times and bad. During periods of financial stress, the inability to meet loan obligations may result in bankruptcy and/or a declining market value.

Disciplinary Information

Legal and Disciplinary

MILLER FINANCIAL GROUP, LLC and its employees have not been involved in legal or disciplinary events related to past or present investment clients.

Other Financial Industry Activities and Affiliations

Financial Industry Activities

MILLER FINANCIAL GROUP, LLC has no other industry activities.

Affiliations

Other than a custodial relationship with TD Ameritrade and certain insurance companies that provide no-load annuity products, MILLER FINANCIAL GROUP, LLC has no arrangements or affiliations that are material to its advisory business.

Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

Code of Ethics

The employees of MILLER FINANCIAL GROUP, LLC have committed to a Code of Ethics that is available for review by clients and prospective clients upon request. The firm will provide a copy of the Code of Ethics to any client or prospective client upon request.

Participation or Interest in Client Transactions

MILLER FINANCIAL GROUP, LLC and its employees may buy or sell securities that are also held by clients. Employees may not trade their own securities ahead of client trades. Employees comply with the provisions of the MILLER FINANCIAL GROUP, LLC Compliance Manual.

Personal Trading

The Chief Compliance Officer of MILLER FINANCIAL GROUP, LLC is Todd Newell. He reviews all employee trades each quarter. The personal trading reviews ensure that the personal trading of employees does not affect the markets, and that clients of the firm receive preferential treatment. Since most employee trades are small mutual fund trades or exchange-traded fund trades, the trades do not affect the securities markets.

Brokerage Practices

Selecting Brokerage Firms

MILLER FINANCIAL GROUP, LLC does not have any affiliation with product sales firms. Specific custodian recommendations are made to Clients based on their need for such services. MILLER FINANCIAL GROUP, LLC recommends custodians based on the proven integrity and financial responsibility of the firm and the best execution of orders at reasonable commission rates.

MILLER FINANCIAL GROUP, LLC has the discretion to choose the broker-dealer.

MILLER FINANCIAL GROUP, LLC recommends discount brokerage firms and trust companies (qualified custodians), such as TD Ameritrade. MILLER

FINANCIAL GROUP, LLC recommends Insurance Companies who specialize in no-load or low-load annuity products.

MILLER FINANCIAL GROUP, LLC does not receive fees or commissions from any of these arrangements.

Best Execution

MILLER FINANCIAL GROUP, LLC reviews the execution of trades at each custodian periodically. The review process is documented in the MILLER FINANCIAL GROUP, LLC Compliance Manual. Trading fees charged by the custodians is also reviewed periodically. MILLER FINANCIAL GROUP, LLC does not receive any portion of the trading fees.

Soft Dollars

MILLER FINANCIAL GROUP, LLC does not receive soft dollar benefits.

Order Aggregation

Most trades are mutual funds or exchange-traded funds where trade aggregation does not garner any client benefit.

Review of Accounts

Periodic Reviews

Account reviews are performed quarterly by Ben Newell and Todd Newell, Owners and Principals. Account reviews are performed more frequently when market conditions dictate.

Review Triggers

Other conditions that may trigger a review are changes in the tax laws, new investment information, and changes in a client's own situation.

Regular Reports

Investment Advisory Clients receive periodic communications on at least a quarterly basis. The written updates may include a net worth statement, portfolio statement, and a summary of objectives and progress towards meeting those objectives.

Client Referrals and Other Compensation

Incoming Referrals

MILLER FINANCIAL GROUP, LLC has been fortunate to receive many client referrals over the years. The referrals came from current clients, estate planning attorneys, accountants, employees, personal friends of employees

and other similar sources. The firm does not compensate referring parties for these referrals.

Referrals Out

MILLER FINANCIAL GROUP, LLC does not accept referral fees or any form of remuneration from other professionals when a prospect or client is referred to them.

Other Compensation

None.

Custody

SEC "Custody"

MILLER FINANCIAL GROUP, LLC does not maintain custody of client funds.

Account Statements

All assets are held at qualified custodians, which means the custodians provide account statements directly to clients at their address of record at least quarterly.

Performance Reports

Clients are urged to compare the account statements received directly from their custodians to the performance report statements provided by MILLER FINANCIAL GROUP, LLC.

Net Worth Statements

MILLER FINANCIAL GROUP, LLC is not required to and does not provide net worth statements.

Investment Discretion

Discretionary Authority for Trading

MILLER FINANCIAL GROUP, LLC accepts discretionary authority to manage securities accounts on behalf of clients. MILLER FINANCIAL GROUP, LLC has the authority to determine, without obtaining specific client consent, the securities to be bought or sold, and the amount of the securities to be bought or sold. However, MILLER FINANCIAL GROUP, LLC consults with the client prior to each trade to obtain concurrence if a blanket trading authorization has not been given.

The client approves the custodian to be used and the commission rates paid to the custodian. MILLER FINANCIAL GROUP, LLC does not receive any portion of the transaction fees or commissions paid by the client to the custodian on certain trades.

Discretionary trading authority facilitates placing trades in your accounts on your behalf so that we may promptly implement the investment policy that you have approved in writing.

Limited Power of Attorney

A limited power of attorney gives trading authorization. The client must sign a limited power of attorney so that we may execute trades on their behalf.

Voting Client Securities

Proxy Votes

MILLER FINANCIAL GROUP, LLC does not vote proxies on securities. Clients may vote their own proxies.

When assistance on voting proxies is requested, MILLER FINANCIAL GROUP, LLC will provide recommendations to the client. If a conflict of interest exists, it will be disclosed to the client.

Financial Information

Financial Condition

MILLER FINANCIAL GROUP, LLC does not have any financial impairment that will preclude the firm from meeting contractual commitments to clients.

A balance sheet is not required to be provided because MILLER FINANCIAL GROUP, LLC does not serve as a custodian for client funds or securities, and does not require prepayment of fees of more than \$500 per client, and six months or more in advance.

Business Continuity Plan

General

MILLER FINANCIAL GROUP, LLC has a Business Continuity Plan in place that provides detailed steps to mitigate and recover from the loss of office space, communications, services or key people.

Disasters

The Business Continuity Plan covers natural disasters such as snow storms, hurricanes, tornados, and flooding. The Plan covers man-made disasters

such as loss of electrical power, loss of water pressure, fire, bomb threat, nuclear emergency, chemical event, biological event, T-1 communications line outage, Internet outage, railway accident and aircraft accident. Electronic files are backed up monthly and archived offsite.

Alternate Offices

Alternate offices are identified to support ongoing operations in the event the main office is unavailable. It is our intention to contact all clients within five days of a disaster that dictates moving our office to an alternate location.

Loss of Key Personnel

In the event of a death or disability of a owner/principal, the surviving owner/principal will assume the primary duties of running the company.

Information Security Program

Information Security

MILLER FINANCIAL GROUP, LLC maintains an information security program to reduce the risk that your personal and confidential information may be breached.

Privacy Notice

MILLER FINANCIAL GROUP, LLC is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us.

The categories of nonpublic information that we collect from you may include information about your personal finances, information about your health to the extent that it is needed for the financial planning process, information about transactions between you and third parties, and information from consumer reporting agencies, e.g., credit reports. We use this information to help you meet your personal financial goals.

With your permission, we disclose limited information to attorneys, accountants, and mortgage lenders with whom you have established a relationship. You may opt out from our sharing information with these nonaffiliated third parties by notifying us at any time by phone, mail, fax, email, or in person. With your permission, we share a limited amount of information about you with your brokerage firm in order to execute securities transactions on your behalf.

We maintain a secure office to ensure that your information is not placed at unreasonable risk. We employ a firewall barrier, secure data encryption techniques and authentication procedures in our computer environment.

We do not provide your personal information to mailing list vendors or solicitors. We require strict confidentiality in our agreements with unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors. Federal and state securities regulators may review our Company records and your personal records as permitted by law.

Personally identifiable information about you will be maintained while you are a client, and for the required period thereafter that records are required to be maintained by federal and state securities laws. After that time, information may be destroyed.

We will notify you in advance if our privacy policy is expected to change. We are required by law to deliver this *Privacy Notice* to you annually, in writing.

Requirements for State-Registered Advisers

Refer to the following ADV-Part 2B for required information on the owners and Principals Ben Newell and Todd Newell.

Brochure Supplement (Part 2B of Form ADV)

Education and Business Standards

MILLER FINANCIAL GROUP, LLC requires that advisors in its employ have a bachelor's degree and further coursework demonstrating knowledge of financial planning and tax planning or work experience that provides a suitable and comparable skillset. Additionally, advisors must have work experience that demonstrates their aptitude for financial planning and investment management.

Ben Newell

Personal:

- Date of birth: March 31, 1983

Educational Background:

- Oregon State University – 2001-2005 Bachelor of Science - Business Administration

Business Experience

- Edward Jones – Registered Representative – 2010 – 2011
- Miller Financial Group – Jan 1, 2012 – Oct 1, 2012
- Miller Financial Group, LLC - Oct 1, 2012 - present

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Ben Newell's contact information:

503-808-9404 ben@millerfinancial.biz

CRD Number: 05787124

Todd Newell

Personal:

- Date of birth: October 31, 1959

Educational Background:

- George Fox University – 1978-1982 Bachelor of Science – Business Administration

Business Experience:

- John Hancock Financial Services – Financial Planner/Sales Mgr. – 1982 – 1992
- Provident Life & Accident, PHA, Johnson & Higgins – Employee Benefit Rep./Broker – 1992-1996
- George Fox University – Director of Estate and Planned Giving – 1996 – 2003
- Providence Medical Foundations – Director of Estate and Planned Giving – 2003-2005
- Northwest Christian Community Foundation – Executive Director – 2005-2006
- A Jesus Church Family, Inc. – Operations Pastor – 2006-2015
- Miller Financial Group, LLC – Jun 1, 2015 – present

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Todd Newell's contact information:

503-808-9404 todd@millerfinancial.biz

CRD Number: 1005622

Bruce W. Miller, CFP®

Personal:

- Date of birth: May 14, 1950

Educational Background:

- Air Force Academy 1968-1972 Bachelor of Science
- UCLA 1972-1973 MBA
- Portland State University 1982-1984 Master of Taxation
- College for Financial Planning 1990

Business Experience:

- Started in the Financial Planning industry in 1984 as a commissioned based Financial Advisor. Founded a Tax practice in conjunction with commissioned based financial planning in 1989. Reestablished Miller Financial Group as a fee-only investment advisory practice in

2000. Formed MILLER FINANCIAL GROUP, LLC as a successor company in 2012.

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Bruce Miller's contact information:

503-808-9404 dragon7@millerfinancial.biz

CRD Number: 0134345