

Robert G. Miller, CFP®, LUTCF



The Miller Financial Group
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This Brochure Supplement provides information about Rob Miller, Independent Investment Advisor Representative, which supplements the ValMark Advisers, Inc. (“ValMark”) Form ADV Part 2A Brochure. Please inform Rob Miller at the contact information listed above if you did not receive ValMark’s Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement. Additional information about ValMark and Rob Miller is available on the SEC’s website at www.adviserinfo.sec.gov and FINRA’s website at www.finra.org/brokercheck.

Educational Background and Business Experience

Robert G. Miller

Date of Birth: 11/26/1953

Education:

- Queens College, CUNY, B.A. Accounting & Information Systems, 1980, Major - Accounting

Examinations and Professional Designations:

- Series 6 – Investment Company Products/Variable Contracts Limited Representative
- Series 63 – Uniform Securities Agent State Law Exam
- CFP® – CERTIFIED FINANCIAL PLANNER™
- LUTCF – Life Underwriting Training Council Fellow

Business Experience:

- Founder & Owner – The Miller Financial Group, 1982 - Present
- Accountant - Ernst & Young, 1980 - 1982

CFP® - CERTIFIED FINANCIAL PLANNER™

The CFP® designation is offered and recognized by the Certified Financial Planning Board of Standards, Inc. Candidates must have a bachelor’s degree (or higher) from an accredited college or university and at least 3 years of full-time personal financial planning experience. Certificants must complete a CFP®-board registered program or hold one of the following designations; CPA, ChFC®, CLU®, CFA®, Ph.D. in business or economics, Doctor of Business Administration, or an Attorney’s License. Certificants must also successfully pass a 2-day comprehensive examination and complete 30 hours of continuing education credits every 2 years.

LUTCF – Life Underwriting Training Council Fellow

The LUTCF designation is offered and recognized by The American College and the National Association of Insurance and Financial Advisors (NAIFA). To earn the LUTCF, candidates must a) complete six courses, one of which is ethics, and b) be a member of a local association of NAIFA.

Disciplinary Information

Registered Investment Advisers are required to disclose material facts regarding any investment related legal or disciplinary events, including issues involving criminal or civil actions, findings resulting from administrative proceeding before the SEC, a self-regulatory body or any other federal or state regulatory authority that would be material to your evaluation of each supervised person providing investment advice.

Rob Miller has no disciplinary record that would impact a client's evaluation of the practice.

Other Business Activities

Rob Miller is a Registered Representative of ValMark Securities, Inc., a broker dealer under common ownership and management of ValMark Advisers, Inc.

Rob Miller is also an insurance agent affiliated with Executive Insurance Agency, Inc., an agency under common ownership and management of ValMark Advisers, Inc.

Rob Miller is owner of REDA Properties, LLC. The LLC owns a rental property.

Additional Compensation

As a Registered Representative of an affiliated broker dealer, ValMark Securities, Inc., Rob Miller is eligible to receive normal commissions associated with securities sales.

Rob Miller is also eligible to receive insurance commissions surrounding the sales of insurance products sold through the affiliated insurance agency, Executive Insurance Agency, Inc.

Rob Miller receives rental income from property owned through REDA Properties, LLC.

Supervision

Rob Miller is an independent investment advisor representative. However, before accepting and implementing investment strategies recommended, supervisory principals at the ValMark home office review and approve of the investment strategies. Accounts are reviewed periodically, usually at least annually by the independent advisor. The home office compliance team also periodically reviews accounts and strategies. These initial and ongoing reviews are under the direction of Chief Compliance Officer, Lynn Goebel who may be reached at 330-576-1234 to discuss questions or concerns in connection with the internal compliance program.