

# THE MILLER FINANCIAL GROUP

## RESOURCE UNIVERSE

- ▶ Focus on Gratitude
- ▶ The Weekly Planning Process
- ▶ The One Year Planner
- ▶ The Strategic Planning Solution
- ▶ The Values Centered Child

The Personal  
Improvement  
Navigator™

The LifePlan  
Design  
Process™

- ▶ Our Meeting of the Minds
- ▶ The Critical Factors Analysis
- ▶ The Making Sense Of It All Meeting
- ▶ Your More Favorable Financial Future
- ▶ The Family Vision Meeting

- ▶ Your Wealth Management System Dashboard
- ▶ The Optimized Portfolio System (TOPS)
- ▶ The College Planning Solution
- ▶ Custom Designed Investment Solutions

Advisory &  
Investment  
Implementation  
Strategies

The Retirement  
Income Survival  
Kit (R.I.S.K.)  
Process™

- ▶ The RISK Engagement Letter
- ▶ The RISK Questionnaire
- ▶ The RISK Blueprint
- ▶ The RISK Comprehensive Review

- ▶ The CARES Conversation
- ▶ The CARES Questionnaire
- ▶ The CARES Blueprint
- ▶ The CARES Comprehensive Review

The  
Comprehensive  
Annuity Review  
& Evaluation  
Service™

The Achieving  
Retirement  
Carity (A.R.C.)  
Process™

- ▶ The ARC Engagement Letter
- ▶ The ARC Questionnaire
- ▶ The ARC Blueprint
- ▶ The ARC Annual Update

- ▶ The Life Settlement Filter
- ▶ The Life Settlement Inquiry
- ▶ The Policy Appraisal Report
- ▶ The Life Settlement Opportunity Evaluation

The Life  
Settlement  
Advocacy  
Program™

The Life  
Assurance 360°  
Process™

- ▶ The Life Assurance Design Solution
- ▶ The Client Underwriting Advocacy Process
- ▶ The Comprehensive Policy Review (CPR)
- ▶ The Policy Service Agreement



*Providing clients with direction where they're feeling confused, with confidence where they're feeling isolated, and with capabilities where they're feeling powerless. Empowering Clients since 1991.*