

# ACCESS FIDUCIARY SERVICES LLC

## FORM ADV PART 2B

BROCHURE SUPPLEMENT

MAY 14, 2021

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## HEATH MILLER

GENERAL COUNSEL

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This brochure supplement (“Supplement Brochure”) dated May 14, 2021 provides information about Heath Miller that supplements the Access Fiduciary Services LLC’s (“AFS” or the “Firm”) Part 2A of Form ADV (“Brochure”). You should have received a copy of that brochure. Please contact Michael Halloran at [mhalloran@accessretirementsolutions.com](mailto:mhalloran@accessretirementsolutions.com) if you did not receive AFS’s Brochure or if you have any questions about the contents of this Supplement Brochure.

Additional information about Access Fiduciary Services, LLC. available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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**Heath Miller**

**Born: 1971**

### EDUCATIONAL BACKGROUND

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1998 Georgetown University – LLM in Taxation and Certificate in Employee Benefits

1997 South Texas College of Law – Juris Doctorate

1993 Illinois State University – B.S in Business Administration

### BUSINESS EXPERIENCE

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01/2021 – Present    General Counsel

Access Fiduciary Services, LLC

11/2009 – Present    ERISA Counsel

Shepherd Kaplan LLC

## ITEM 3: DISCIPLINARY INFORMATION

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There are no legal, civil or disciplinary events to disclose regarding Mr. Miller. Mr. Miller has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Miller.

## ITEM 4: OTHER BUSINESS ACTIVITIES

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Mr. Miller spends approximately 90% of his time during trading hours as ERISA Counsel for Shepherd Kaplan, LLC (“SK”) an SEC registered investment advisor. Mr. Miller and AFS are committed to acting in the client’s best interest. Mr. Miller does not give any investment advice to clients or AFS or SK. Mr. Miller has not entered into any solicitation arrangement with SK to refer clients to AFS or vice versa.

Mr. Miller in his individual capacity, owns half of 3cStructures LLC (“3c”), a Delaware limited liability company. 3c provides consulting services and assists in the creation of structures utilized in connection with the acquisition of private placement life insurance and private placement variable annuities. Mr. Miller provides legal services to 3c.

Mr. Miller provides legal consulting services in his individual capacity as a licensed and practicing attorney. Mr. Miller acquired a minority ownership in BondswithoutBorders (“BwB”) in exchange for his consulting services. BwB is an alternative cryptocurrency platform, which has been accepted into the financial technology incubator in Abu Dhabi. BwB does not maintain any clients in the United States.

#### ITEM 5: ADDITIONAL COMPENSATION

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Mr. Miller may receive compensation in connection with the outside business activities listed in Item 4.

#### ITEM 6: SUPERVISION

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Michael Halloran is the Chief Compliance Officer and Investment Advisor Representative of AFS. AFS provides investment advisory services in accordance with its policies and procedures manual. As AFS's Chief Compliance Officer, Heath Miller is responsible for the implementation of the Firm's policies and procedures. Michael Halloran may be contacted at (202) 302-7117 or [mhalloran@accessretirementsolutions.com](mailto:mhalloran@accessretirementsolutions.com) for more information about this Brochure Supplement.

#### ITEM 7: REQUIREMENTS FOR STATE-REGISTERED ADVISERS

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Mr. Miller has NOT been involved in an arbitration, civil proceeding, self-regulatory proceeding, or administrative proceeding. Nor has he been the subject of a bankruptcy petition.