

Miller Global Investments
FORM CRS – CUSTOMER RELATIONSHIP SUMMARY
March 27, 2023

<p>Item 1. <u>Introduction</u></p>	<p>Miller Global Investments is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Brokerage and investment advisory services and fees differ and it is important for you to understand these differences. Free and simple tools are available to research firms and financial professionals at Investor.gov/CRS, which also provides educational materials about broker-dealers, investment adviser, and investing.</p>
<p>Item 2. <u>Relationships and Services</u></p> <p>What investment services and advice can you provide me?</p>	<p>We offer investment advisory services to retail investors including investment management services through Separately Managed Accounts (SMA) and financial planning services. There are no material limitations on our investment services.</p> <p>SMA – We tailor our services to the specific needs of each client. We mostly select individual stocks and bonds. Our service is determined in conjunction with the client by their goals, objectives, and risk tolerance. We review this information with our clients on a periodic basis and monitor client’s accounts on a quarterly basis. This is offered as part of the standard service.</p> <p>Financial Planning – We help clients plan for lifestyle, charitable, retirement, estate, and healthcare issues based on their individual objectives. We do not prepare legal documents.</p> <p>For our advisory service, we have discretionary investment authority and make specific investment decisions. Our client’s investments are monitored on a regular basis as set out in the Compliance Program. We do not offer any proprietary products and do not have a limited menu of products or types of investments. The minimum investment for SMAs is generally \$1,000,000 but may be altered at our sole discretion.</p> <p>Additional information. Please see Form ADV Part 2A Brochure (Items 4 and 7). Form ADV Part 2A Brochure.pdf</p> <p>Conversation Starters. Ask your financial professional:</p> <p>Given my financial situation, should I choose an investment advisory service? Why or why not?</p> <p>How will you choose investments to recommend to me?</p> <p>What is your relevant experience, including your licenses, education, and other qualifications?</p> <p>What do these qualifications mean?</p>
<p>Item 3. <u>Fees, Costs, Conflicts, and Standard of Conduct</u></p> <p>A. What fees will I pay?</p>	<p>SMA clients are charged a quarterly management fee in advance based on assets under management. Depending on the investment strategy, a fixed percentage fee or tiered sliding scale calculation is charged. As the fee we charge is asset based, the more assets you have in your account invested with us, the more you will pay in fees. We may therefore have an incentive to encourage you, the investor, to increase the assets in your account. Currently, we are not charging management fees for cash equivalents. Fee schedules are reviewed annually. Our custodian does not charge a custody fee but will pass-on money market funds fees on cash balances to the SMAs. Other fees are from exchange traded funds and mutual funds. SMAs may incur brokerage commissions.</p> <p>Additional Information. You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying. Please see Form AD, Part 2A Brochure (Items 5 and 6 of Part 2A). Form ADV Part 2A Brochure.pdf</p> <p>Conversation Starter. Ask your financial professional—</p> <p>Help me understand how these fees and costs might affect my investments. If I give you \$10,000 to invest, how much will go to fees and costs, and how much will be invested for me?</p>
<p>Item 3. <u>Fees, Costs, Conflicts, and Standard of Conduct</u></p> <p>B. What are your legal obligations to</p>	<p>When we act as your investment adviser, we have to act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about these conflicts because they can affect the investment advice we provide you.</p> <p>Here is an example to help you understand what this means. We receive certain benefits from the custodian we recommend to hold your account assets. For additional information, please refer to Item 5 of our Form ADV brochure. Form ADV Part 2A Brochure.pdf</p>

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me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?	<p>Conversation Starter. Ask your financial professional— How might your conflicts of interest affect me, and how will you address them?</p>
<p>Item 3. <u>Fees, Costs, Conflicts, and Standard of Conduct</u></p> <p>C. How do your financial professionals make money?</p>	<p>The Principal and staff of the firm are compensated via a monthly wage. Our financial professionals are not compensated on the amount of client assets they service, on the time and complexity required to meet a client’s needs, or on the revenues earned from recommendations. Since we do not sell products, our financial professionals are not compensated on products sold or sales commissions.</p>
<p>Item 4. <u>Disciplinary History</u></p> <p>Do your financial professionals have legal or disciplinary history?</p>	<p>No Visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.</p> <p>Conversation Starter. Ask your financial professional— As a financial professional, do you have any disciplinary history? For what type of conduct?</p>
<p>Item 5. <u>Additional Information</u></p>	<p>For additional information about our services, please visit http://www.millerglobalinvestments.com/. If you would like additional, up-to-date information or a copy of this disclosure, please call (214) 272 8504.</p> <p>Conversation Starter. Ask your financial professional— Who is my primary contact person? Is he or she a representative of an investment-adviser or a broker-dealer? Who can I talk to if I have concerns about how this person is treating me?</p>