



## Mark A. Miller, CFA



Upon graduating from Valparaiso University School of Law, Mark worked as an attorney with the law firm Berry Moorman, P.C. in Detroit. At Berry Moorman, Mark

focused his practice in estate planning, tax, corporate law, and trust and estate administration. Mark later joined the law firm of Heritier Nance & Sheridan in Troy, Michigan, where he expanded his practice to financial and estate planning for high net worth clients and corporate mergers and acquisitions.

Prior to forming Miller Capital Partners, Mark was a member of the Private Management Group at Munder Capital Management. At that time, this investment firm managed nearly \$53 billion in assets. The Private Management Group of Munder focused on investing for high net worth individuals, foundations and endowments.

Mark is President of Miller Capital Partners, an independent Registered Investment Advisor.

### **Memberships:**

- CFA Institute (CFA Society of Detroit)
- Financial and Estate Planning Council of Metro Detroit
- State Bar of Michigan

### **Publications\*:**

- Wealth Management of the Affluent, JOURNAL OF FINANCIAL PLANNING, Oct. 2000.
- Shall We Dance (Trust Investment Strategies), BLOOMBERG WEALTH MANAGER, Feb. 2001.
- Will Your Client's Trust Survive Over the Long-Term? MICHIGAN LAWYERS WEEKLY, Nov. 2001.
- Preventive Care (Trust Viability and Investment Analysis), BLOOMBERG WEALTH MANAGER, Dec. 2001.
- Hedging Strategies for Protecting Appreciation in Securities and Portfolios (A Complete Thought Process for Financial Planners) JOURNAL OF FINANCIAL PLANNING, Aug. 2002.
- Protecting Appreciation in Taxable Investment Securities and Portfolios with Hedging Strategies (A Complete Thought Process for Investment Advisors and Trustees) JOURNAL OF WEALTH MANAGEMENT, Fall 2002.

\* Available upon request.