

NEWS



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Brown Miller Wealth Management Announces Status as Registered Investment Advisor

Veteran advisors lead new DC-area firm with focus on understanding clients' goals, designing plan to achieve them

McLean, Va. (Mar. 4, 2020) – Christopher W. Brown, CFP[®], CIMA[®], and partner David A. Miller, CFP[®], today announced the launch of [Brown Miller Wealth Management](#), a fee-only, Registered Investment Advisory firm (RIA) in the Washington, DC area. Brown and Miller had previously practiced as part of Wells Fargo Advisors.

Brown has been providing financial advisory services to clients for more than 25 years, focusing on the complex needs unique to high net worth individuals, businesses, endowments and foundations. Beginning his advisory career with A.G. Edwards & Sons in 1992, he built a highly regarded wealth management team, which welcomed David Miller in 2004. The Brown Miller duo and a support team continued to work together through that firm's acquisition by Wachovia Securities, followed by Wells Fargo's acquisition of Wachovia in 2008, and will continue on as the independently owned and operated entity Brown Miller Wealth Management, LLC.

“Our objective has always been to help clients achieve their financial goals and to provide a customized, transparent, white gloved experience,” said Brown. “We realized that the best way to continue to provide a fiduciary standard of care and be able to provide our clients with the best possible investment offerings, was to become independent and establish the firm as an RIA. As such, we will be able to conduct business in a way that is truer to our core mission and values, and to fully deliver on our ‘Discover, Design, Deliver’ promise to clients.”

EXPANDED ACCESS, SEAMLESS TRANSITION

With the new independent structure, Brown Miller clients will have expanded access to professional financial planning and investment solutions. The firm is engaging [TradePMR](#) for technology and custodial support based on their twenty-year track record of serving thousands of advisors. [First Clearing](#), a trade name used by Wells Fargo Clearing Service, LLC, a member of SIPC, a registered broker/dealer and non-bank affiliate of Wells Fargo & Company, will provide securities execution and brokerage clearance services.

“TradePMR's award-winning software, ability to integrate with other providers, and high advisor satisfaction ratings are reassuring,” said Miller. “Clients were able to seamlessly transition to our new independent firm with only a few signatures. Because we retain the same custodian, account numbers and standing instructions stayed intact, and they remained fully invested.”

To celebrate the new RIA structure, Brown Miller Wealth Management has launched a new website and moved to new offices at 8280 Greensboro Drive, across from the new Boro development in McLean, Virginia. Clients and interested others are invited to drop by during standard business hours and/or to call 703-775-4400 for a scheduled office tour and confidential conversation.

ABOUT BROWN MILLER WEALTH MANAGEMENT

Brown Miller was founded in 2020 as an SEC Registered Investment Advisor and financial planning firm, serving affluent individuals and families. The firm provides comprehensive planning services and investment management. Located in McLean, Virginia, the firm serves clients nationwide but has a natural concentration of clients in the Washington, DC area. Learn more at www.BrownMillerWM.com.

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