## Joshua D. Miller, CFP®

Senior Financial Advisor
Employee Stock Option Specialist

My role is to facilitate the development of a client's financial values, goals and vision. I help clients to envision what they want financial success to mean both during their lifetime and afterward. I then help develop a customized financial plan that addresses multi-generational planning as well as day-to-day needs. By understanding your goals, dreams and values, I can help you make financial and investment decisions that align with your values and help you achieve your goals.

I work with my clients to design a personal financial plan around their life goals. This strategy focuses on helping them become more confident about managing their financial objectives. It is designed to provide solutions to both everyday and long-term financial goals, and is personalized to meet the needs of high net worth individuals and small business owners. We continually monitor progress toward your financial goals and update your plan based on changes in market conditions and your individual situation.

**Mission Statement**
We deliver financial solutions for today and tomorrow through a comprehensive personalized financial planning approach built on a long-term relationship with a knowledgeable advisor.

**Select Professionals**
Ameriprise Platinum Financial Services® advisors are selected from among our most experienced, accomplished professionals. Each has received special training and has earned one or more professional designations, such as CFP®, ChFC® or JD, in addition to having a track record that demonstrates an ability to offer quality advice. Platinum Financial Services advisors must possess strong leadership capabilities, yet also be able to function as an integral part of a financial advisory team, knowing when to draw on the experience and knowledge of specialists. Above all, they understand the expectations of our most affluent clients and are committed to meeting those expectations.

**Services Offered**
Personal financial planning for retirement, tax management strategies, education funding, wealth preservation strategies, protection planning/family security and investments.

**Business Experience**
2001 to present, Senior Financial Advisor, Ameriprise Financial Services, Inc., San Jose, CA and Campbell, CA

1992 - 2001, Financial Advisor, Ameriprise Financial Services, Inc., Campbell, CA

1990 - 1992, Assistant Branch Manager, Security Pacific National Bank, Covina, CA

**Designations and Degrees**
CERTIFIED FINANCIAL PLANNER™ practitioner

B.A., 1990, Business Economics and Sociology
University of California at Santa Barbara
Santa Barbara, CA

**Personal**
Marital Status: Married. Wife, Lori.
Children: Two sons, Evan and Owen.
Enjoy golf, movies, travel and spending time with my wife and sons

**Ameriprise Financial Services, Inc.**
Knight Ridder Building
Suite 900
50 W San Fernando St.
San Jose, CA 95113
Bus (408) 918-5300 Ext. 321
Fax (408) 998-2102
joshua.d.miller@ampf.com
www.ameripriseadvisors.com/joshua.d.miller/
CA Insurance Lic. #0B05831

## Our unique and collaborative approach to financial planning.

*Dream ➤ Plan ➤ Track ➤®*

**Define your DREAM.**
Before discussing numbers, we can help you determine where you'd like to go, what you'd like to do and where you'd like to be in years to come.

**Develop your PLAN.**
We provide a tailored financial plan based on a clear understanding of your needs, situation and goals. Then, you and your advisor will determine the right combination of products and services needed to implement your financial plan.

**TRACK your progress.**
Your needs and goals evolve over time. Through our ongoing relationship, we'll revisit your plan and make adjustments to your strategies and tactics, helping you to stay on track.

## The Ameriprise Financial Story

Financial priorities differ from person to person. They can also differ from year to year. At Ameriprise Financial, we think it's important for you to have a plan that is tailored to your needs and has the flexibility to evolve with you. We take a unique, comprehensive and on-going approach to financial planning called *Dream > Plan > Track >*®. We get to know you personally – your goals, your worries and your dreams. We then draw on our more than 110-year heritage to provide experienced guidance to help you develop a customized financial plan with the appropriate combination of products and services. An Ameriprise financial advisor will be there with you for the long run – making adjustments to your strategies and tactics, helping you stay on track. That's how The Personal Advisors of Ameriprise Financial help over two million people take control of their financial futures. Life is full of surprises and opportunities. We can help prepare you.

Get to **What's next.**®



Ameriprise Financial Services, Inc.
200 Ameriprise Financial Center
Minneapolis, MN 55474
ameriprise.com



The Personal Advisors of Ameriprise Financial®

## An Ameriprise Platinum Financial Services® practice

*We shape financial solutions for a lifetime*®