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101 West Main Street, Suite 720 Norfolk, VA 23510

PARTNERING WITH YOU ON YOUR FINANCIAL JOURNEY

SERVICE

Founded with the ultimate goal of focusing solely on our clients.

ATTENTIVE

We believe that a partnership requires open communication about the details of your life that makes your story unique. To truly understand the dreams and goals of our clients, we must be dedicated and focused on listening to your story.

DILIGENT

Our foundation in service is built upon delivery of services based on your needs. Hard work is at the core of everything we do. We pride ourselves on our dedication to service, and we strive everyday to embody the motto of our founders' alma mater, Virginia Tech, "Ut Prosim" – That I may serve.

Learn more about our dedication to service! (http://www.couragemiller.com/benefits_of_a

EXPERIENCE

We have been honored over the years to serve clients with their diverse financial needs. We work with families and individuals on their personal finances, foundations and trusts on their institutional investments, and small businesses on their retirement plan needs. We strive to build trusted relationships, so that you are able to focus on things that are more important to you such as your family and career. We focus on serving with 4 major principles: Honesty, Transparency, Dependability, and Continuous Improvement



Learn why we started Courage Miller Partners

from **Courage Miller Partners**

01:04

INDEPENDENT GUIDANCE

We established our business as an independent fee only registered investment advisor. Our goal was to remove conflicts of interest that exist by being paid commissions for selling products. As a result we strive to deliver independent guidance and exceptional service for our clients. Below are a few ways we can serve you:

FINANCIAL ORGANIZATION AND CONSULTING SERVICES **(http://www.couragemiller.com/focus_program/)**

Many investors, trustees and financial stewards find their investments spread across a number of financial institutions. As the years pass and life becomes more complex, it becomes increasingly difficult to properly organize and track all your investments. As a result, it is difficult to ensure you are on track with a sensible financial plan. Through our FOCuS Program, we strive to increase successful outcomes.

FIDUCIARY REPORTING AND CONSULTING SERVICES **(<http://www.couragemiller.com/fiduciary-reporting-services/>)**

Fiduciary portfolios, such as trusts, have been carefully established in order to protect loved ones or provide long lasting funds to help important causes. Of all responsibilities that fiduciaries have, the duty to monitor service providers and investment managers is the most time consuming and critical.

PORTFOLIO MANAGEMENT SERVICES (<http://www.couragemiller.com/portfolio-management/>)

With many years of managing investment portfolios for our clients, we believe that a sound investment process founded in 5 principles of investing increases the probability of success while reducing volatility.

RETIREMENT PLAN CONSULTING (<http://www.couragemiller.com/retirement-plan-consulting/>)

Retirement Plans continue to gain focus in the United States because of the significant shift from traditional pension plans to Defined Contribution Plans. Plan sponsors and those responsible for overseeing the retirement plan have a tremendous amount of responsibility. Whether your organization already has a retirement plan or you are looking to setup a retirement plan as an employee benefit, the complexities can be overwhelming. We work to reduce the complexity and help you find the best options for you and your organization.

Learn how our independence benefits you! (http://www.couragemiller.com/benefits_of_a

TEAM

We serve our clients as a team. Together each member of the team serves as an integral part of the service we deliver. Through our coordinated efforts our goal is to ensure our clients' interests are first and that we provide exceptional service for our clients.

LET'S PARTNER TOGETHER

Don't hesitate to get in touch with us.
We would be honored by the opportunity to serve you.

Contact Information:

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Name: (required)

Email: (required)

Phone number:

Message:

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Thank you



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