



Financial Advisors of Delaware Valley

Gregg Millman, MBA, RICP®
Financial Advisor

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Three decades of experience in financial services, tax planning and corporate management has equipped Gregg with the comprehensive knowledge he employs as a financial professional. Focusing on wealth accumulation and preservation strategies for individuals and businesses, he has developed an interactive and educational method which helps provide clients with objective, thoughtful knowledge in a concise actionable plan.

This holistic approach includes a thorough review of each client's situation. Consulting with a team of professionals, Gregg crafts creative, personalized solution recommendations designed to help protect wealth and achieve financial objectives. He communicates the strategies personally to each client, whether an individual, professional or business owner. Together they refine and implement plans to assist in achieving the desired long-term financial goals.

Gregg feels that personalized service is essential when selecting financial strategies and when reviewing with clients on an on-going basis to implement their plans. "It is critical that my clients understand their unique situation, what they own and how everything works together," he explains. "I am not satisfied until the client can articulate back to me their comprehension of the plan, from goals to the suggested products, and how they work together. Especially important is my clients' understanding of what to expect regarding investments." He feels strongly that the effort is on-going, requires commitment and communication and must be done holistically so that all parts dove-tail into a solution which may include:

- Investments
- Wealth Accumulation (grow & preserve) Strategies
- Retirement Planning, including Social Security & Medicare
- Personal, Business and Trust Owned Life Insurance
- College Education Planning
- Tax Planning Strategies
- Business Pension Plans, stock options decisions and pension – lump sum decisions

Innately inquisitive and analytical, Gregg earned a Bachelor of Science degree in Chemistry from the University of Michigan and a Master of Business Administration (MBA) in Finance from the University Of Cincinnati Lindner College Of Business. Gregg has also received his Retirement Income Certified Professional (RICP®) designation from The American College.

Gregg and his wife, Susan, reside in Bryn Mawr, PA.

Offices in
Delaware ♦ Pennsylvania ♦ New Jersey ♦ Maryland

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