



## Jason R. Miller, CFP®

### Vice President National Head of Wealth Planning

#### Let's connect

**Jason R. Miller, CFP®**

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Jason Miller is Vice President and National Head of Wealth Planning with BMO Private Bank and is responsible for strategic development and delivery of customized financial planning services to high net worth individuals and families.

He joined BMO in 2010 and has more than 10 years of experience in financial services. Jason earned his BS in Finance, cum laude, from the W.P. Carey School of Business at Arizona State University and his MBA with

an emphasis in Finance from the Marriott School of Management at Brigham Young University. He is a CERTIFIED FINANCIAL PLANNER™ professional.

Jason is a member of the Chicago Estate Planning Council, the BYU Management Society and volunteers for the Boy Scouts of America. He is also a past President and Chairman of the Financial Planning Association of Greater Phoenix and currently serves on the BMO Delaware Trust Board.

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- Wealth Advisory Services
- Investment Management
- Trust and Estate Services
- Financial Planning
- Private Banking
- Philanthropic Advice



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