

TRACY ANN MILLER



RED RIVER
ADVISORS, LLC

When you work with Tracy Ann Miller, you're not treated like a client, you are treated like family. "My clients know I'm dependable and that I'll always be there for them," says the respected financial planner. "I want them to be able to sleep well at night and know they are securing a better future for themselves."

Tracy Ann is CEO of Red River Advisors, LLC. She has spent more than two decades in the financial arena. In addition to founding Red River, Tracy Ann is a partner in the financial planning and investment firm Portfolio, LLC. Her

impressive history in financial management includes serving as vice president of a major New York bank, managing estate planning and wealth transfer in the advanced products division of Aegon Insurance Group and serving as vice president of Charles Schwab's Private Client group.

Tracy Ann's decision to start Red River came from her desire to work

more closely with her clients. "I wanted to work directly with families and individuals to help solve their financial planning problems," she says. "As an independent advisor, I work for my clients, not for a company. I'm able to build better relationships with clients and meet more of their needs, as a result."

Being able to see the "big picture" plays a crucial role in determining these needs, and for Tracy Ann, this begins with learning about her clients. "From their family and their background, to their hopes and their fears, I want to make sure I have all the information," she says. "Taking a holistic approach to planning helps me understand all the dynamics of my clients' financial situation."

And Tracy Ann wants to make sure her clients understand their finances, too. "Before recommending a product or plan, I make sure they understand all of their options," she says. "I'm not there to sell; I'm there to educate. When my clients are aware of all of their choices, we work together to determine what will make the most sense for them."

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Tracy Ann is a graduate of the University of Oklahoma and has earned professional designations as a Certified Financial Planner, Chartered Financial Consultant and Chartered Life Underwriter. She enjoys being active in her community, serving on the boards of the Oklahoma City Estate Planning Council and as Treasurer of her Homeowner Association. When not helping her clients secure their futures, she enjoys traveling and spending time outdoors.



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