

Part 2B of Form ADV: *Brochure Supplement*

William P. Miller

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This brochure supplement provides information about William P. Miller that supplements the Patton Albertson Miller Group, LLC brochure. You should have received a copy of that brochure. Please contact William P. Miller if you did not receive Patton Albertson Miller Group, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about William P. Miller is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2. Educational Background and Business Experience

William P. Miller

Year of Birth: 1951

Education:

- University of Virginia, B.A. in Economics, 1974
- Virginia Commonwealth University, M.B.A., 1980

Professional Designation:

- Chartered Financial Analyst (CFA), granted by the CFA Institute, 1985¹

Business Background:

- Patton Albertson Miller Group, LLC (successor to Patton Albertson & Miller, LLC), Principal and Chief Investment Officer, 2003—Present

Item 3. Disciplinary Information

Mr. Miller has no history of any disciplinary events.

Item 4. Other Business Activities

Mr. Miller is a founding partner and member of Patton Albertson Miller Group, LLC which is the single member of a Member- Managed South Dakota Limited Liability Company, PAM Fiduciary Services Limited, LLC ("PFSL"). PFSL was formed to serve as an entity under South Dakota Codified Laws (SDCL) §51A-6A-66 for the purpose of serving as a limited independent trustee which may include the roles of trust protector,

¹ To earn the Chartered Financial Analyst designation, or CFA charter, a candidate must have four years of qualified investment work experience, [become a member of CFA Institute](#), pledge to adhere to the CFA Institute [Code of Ethics and Standards of Professional Conduct](#) on an annual basis, apply for membership to a [local CFA member society](#), and complete the CFA Program. The CFA Program is organized into three levels, each culminating in a six-hour exam. [Completing the Program](#) takes most candidates between two and five years. The CFA Program reflects a broad [Candidate Body of Knowledge](#)[™] (CBOK) developed and continuously updated by active practitioners to ensure that charterholders possess knowledge grounded in the real world of today's global investment industry.

investment advisor and/or distribution advisor. LLC's serving in this capacity are not required to hold trust powers under South Dakota law. PFSL may only serve in this role for trusts with a South Dakota situs. Under Rule 206(4)2 of the Investment Advisors Act of 1940, PAM is deemed to have custody of accounts under which PFSL serves as an independent trustee.

Item 5. Additional Compensation

Mr. Miller may directly or indirectly receive earn-out or other compensation from Focus Financial Partners, LLC, the indirect parent company of PAM.

Item 6. Supervision

James Patton, Chief Executive Officer, Marc Albertson, Director of Client Services, and Lisa Bryant, Chief Compliance Officer are responsible for the supervision and monitoring of investment advice offered to advisory clients of Patton Albertson Miller Group, LLC. They can be reached at (423) 414-2100. These individuals will review all employee personal securities transactions on a quarterly basis, oversee all material investment policy changes, and conduct periodic testing to ensure that client objectives and mandates are being met.