

# Miracle Ascension

**S**ara Rajo-Miller has accrued significant recognition as a result of her growing career as a financial advisor for Miracle Mile Advisors in Los Angeles.

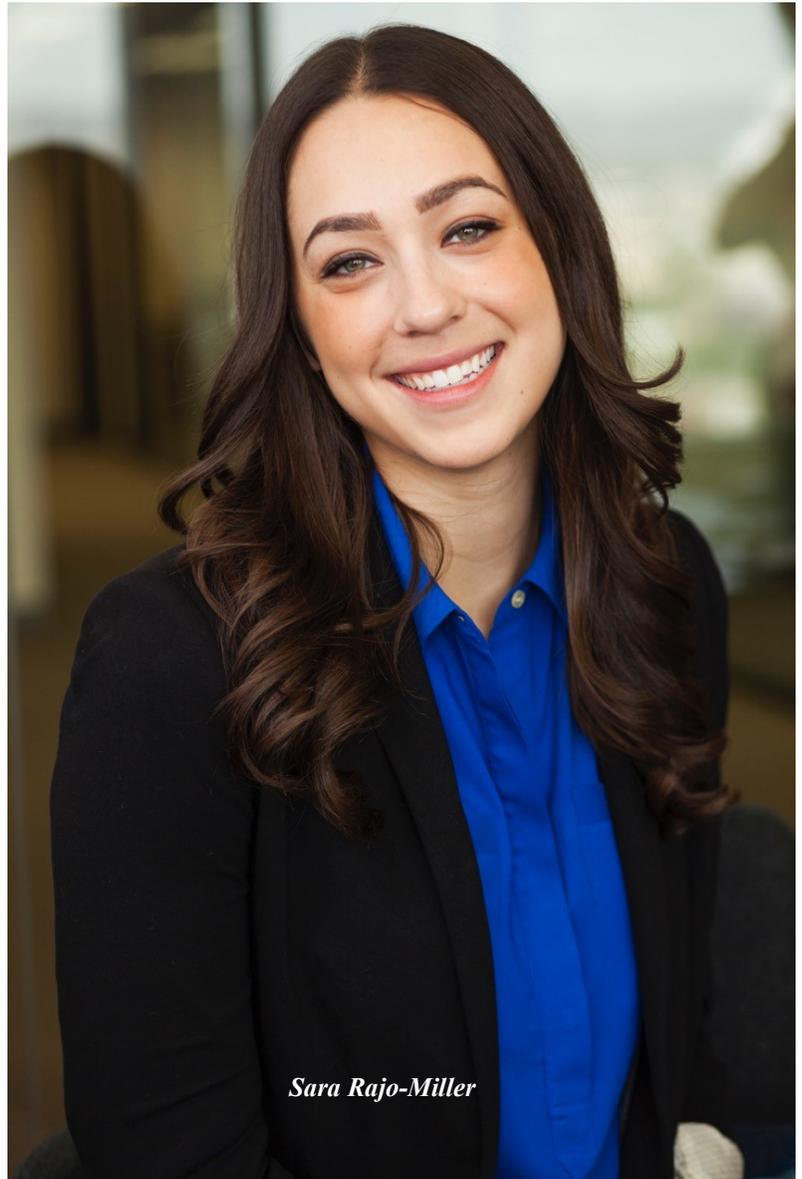
Most recently, she was featured as a guest speaker at Forbes/SHOOK Top Next-Gen Advisor Summit in October 2017 in the SHOOK “Ones” speaker series, which features America’s top Millennial Advisors at their annual Forbes Under 30 Summit.

“It was a great way to learn what other people are doing,” she says, characteristically looking ahead at the long game, rather than being lulled by her successes.

Last year, Rajo-Miller was ranked number 20 on Forbes’ America’s Top 500 Millennial Wealth Advisors and 126 in the nation on Forbes Top Women Wealth Advisors. Her advisory business has recently seen enormous growth with over \$350 million in assets across over 80 families.

There are several reasons that can account for her success, including a natural poise, a strong work ethic, excellent mentoring, innate talent, networking, and a genuine passion for her work and her clients.

Rajo-Miller’s confidence is pleasant, not pushy. A sweet smile plays about her mouth with a charming affect. It is not only her knowledge of wealth management that informs her success; it is also how she regards others, including a conviction that she truly wishes to help them realize their financial



*Sara Rajo-Miller*

***Sara Rajo-Miller has soared from intern to nationally ranked financial advisor, garnering acclaim, success and recognition at a staggering pace.***

goals. She really cares.

As a student at UCLA in 2013, Rajo-Miller interned at Miracle Mile Advisors, a small firm with four people and \$150 million in assets under management.

Today, the firm has 17 people and almost \$1 billion under management.

“I really learned the business from the bottom up,” she says. “As a recent graduate, starting my career at a boutique firm allowed me to take a ‘hands-on’ approach to problem-solving and learn more quickly than my counterparts at larger, more traditional firms.”

Being at a smaller, more independent firm, she

was given the opportunity to participate in every aspect of the business from the get-go. “You’re part of everything, every step of the process,” she says.

In an industry that “favors grey hairs,” she says, “you have to know it all. I have had to prove I know what I’m doing.”

“I have known Sara Rajo-Miller for most of her professional life,” says Miracle Mile CEO Brock Moseley. “In addition to being a truly gifted financial planner and investment advisor to our ultra-high net worth clients, she has also become a prominent thought leader in our fast changing industry.”

**P**erhaps her confidence can be partly attributed to an international childhood. As the daughter of foreign correspondents, she grew up in Mexico, Germany, England and Israel before reaching the United States, where she attended Marlborough School, an esteemed all-girls enclave of Los Angeles’ most important families. However, she is not effete.

“I’ve had a job since I can remember,” she says of her work ethic. “It’s something I pride myself in. I always loved working. I was interested in business but I didn’t know what I wanted to do until I started working here,” she adds, referring to Miracle Mile Advisors.

Financial planning is about listening -- “and I love listening to people, learning about their goals and what matters to them,” she says.

It is about understanding a client’s financial goals and then constructing a portfolio and financial plan that will help them achieve those goals.

Rajo-Miller works with business owners who are preparing to go through a liquidity event to build a portfolio that can support their lifestyle when they no longer have their business.

Rajo-Miller often favors ETFs and index funds for her client’s portfolios. ETFs, unlike Mutual Funds, cost less, are more tax-efficient and have intra-day liquidity.

She focuses on what she calls “tactical asset allocation” and looks for undervalued areas of the markets, such as emerging and international equities. “Foreign equities could be lined up for a period of extended out-performance,” she says.

As for her millennial peers, Rajo-Miller be-

lieves they are perhaps more conscientious about their wealth management than they are given credit. “Contrary to popular belief, millennials are saving money and thinking about the future,” she says. “They don’t trust big institutions, especially after living through 2008.”

Her young clients are grappling with stock options, are getting married and starting families, buying their first homes, and planning their futures. “And they want customized financial planning experience,” she says.

Rajo-Miller also attributes a lot of her success to her mentor and business partner Duncan Rolph, one of the principals of Miracle Mile, with whom she started working when she joined the firm.

Since then, her business has experienced significant growth.

“I do a lot of networking,” Rajo-Miller says. “Most of my business comes from client referrals and other advisors.” She is constantly networking, not just for her own business, but also to connect other people. Bringing people together helps foster connections, she says.

Rajo-Miller is committed to sharing information and mentoring the next generation of financial advisors. She brought her peers into the firm, where they have been trained as analysts. The best have become financial advisors, just as she has.

As a Registered Investment Advisor (RIA), “I don’t have anything to sell. I only make money as a percentage of the assets I manage,” Rajo-Miller says. “There is no revenue sharing or kickbacks, and no incentives or proprietary products. My clients value the fact that I am a fiduciary and completely independent.” — *By Victoria Talbot, California Business Journal*

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