"The mutual understanding and respect of a client/planner relationship are two qualities I hold in the highest regard."
~Randy Miles

About Randy Miles, Sr., AIF®

Randy Miles, Sr. is a knowledgeable financial professional, providing quality investment recommendations and support to business owners and individuals since 1981. He founded Miles Financial Services, Inc. in 1996 to provide his clients with indispensible advice free from the constraint of affiliations with investment banking and insurance corporations. He is a purveyor of understanding, and seeks to provide all of his clients with the options and education necessary to make prudent financial decisions.

Randy earned an associate's degree from the Altoona School of Commerce, majoring in business administration. He was affiliated with Prudential Insurance Company for 15 years before starting his own business in 1996. As a financial professional, Randy holds FINRA Series 6, 7, 63, and 65 licenses, along with several health and life insurance licenses to better serve his clients.

When away from the office, Randy is a dedicated community volunteer. He is a member of the Tyrone Chamber of Commerce, the Financial Committee of Wesley United Methodist Church, and on the board of the Tyrone Area School District, serving as district treasurer and chair of the Finance Committee. A family man at heart, Randy relaxes by spending time with his wife, Jan, children, and grandchildren.

AIF®

Our Values and Philosophy

Honesty. Integrity. Caring. To us, these are not just words. These are the ideals that we strive to achieve at Miles Financial Services, Inc. Individuals and businesses alike come to us to receive quality investment guidance and advice. Our clients trust us to help them achieve financial security. We speak fairly and with dignity, striving to be of benefit to all we serve.

Retirement Plans and Business Owners

We specialize in working with plan trustees and small business owners, providing them with creative planning resolutions for their business and employees. A comprehensive employer-sponsored retirement plan can help increase retention rates and keep valuable employees, which in turn helps your business grow. As a 3(21) investment advisor, we are experienced in a variety of different retirement options, including 401(k)s, 403(b)s, profit sharing plans, defined benefit plans, Simple IRAs, and SEP IRAs.

Randy's Accredited Investment Fiduciary® (AIF®) designation certifies that he has specialized knowledge of fiduciary standards as they relate to the retirement plan creation process. Recipients of the AIF® designation must meet prerequisites based on education, industry experience, and professional development. It also includes a comprehensive training program and final examination. Randy has pledged to abide by the AIF® Designee Code of Ethics and completes six hours of continuing education each year.

Financial Education

As part of our ongoing dedication to you, we are happy to provide educational opportunities for your plan participants, letting them know the value of their retirement plan and giving them strategies to maximize their retirement savings. As your trusted advisor, we are here to help your business and your employees succeed.

An Alliance of Independents

As an independent financial services firm, we are not affiliated with any insurance or investment companies, so we are truly objective in the advice we give and the products we recommend. We are aligned with one of the most respected independent broker-dealers in the industry, Cambridge Investment Research, Inc. With Cambridge, we offer you the objectivity of working with an independent financial advisor combined with the ability to access a wide range of diversified financial services and a wealth of investment resources.

Call 814-684-7603 for a complimentary review of your plan today.

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