We believe there is no substitute for time spent with clients.

Founded in 2003, our primary concern is to help our clients achieve their financial goals.

Watch full video

L. Daniel Akers, Jr. is a financial planning and investment management professional with over two decades of industry experience. He is a graduate of the University of Virginia and holds an M.B.A. from Wake Forest University. Dan is also a Certified Public Accountant.

"Our client relationships are anchored in experience, integrity and knowledge.

Learn More About L. Daniel Akers, Jr. →

OUR ADVISORS

L. Daniel Akers, Jr., CFP®, CPA | Managing Principal, Financial Advisor

Logan Bolick, CFA, CFP® | Director of Research, Financial Advisor

Kyle R. Boyd | Managing Principal, Financial Advisor

Jacqui S. Friedrich, CFP® | Director of Financial Planning, Senior Financial Advisor

Jeff Howden | Chief Investment Strategist, Director of Family Office Services, Financial Advisor

Jonathan Shumate, CFP® | Senior Financial Advisor

Meet The Whole Team →

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Altavista Wealth Management, Inc. provides a wide range of investment management and fiduciary services. Our services are designed to assist clients in all aspects of their financial lives.

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From client on-boarding, to meetings and social & educational events, we share our expertise by leveraging technology and committing to transparent communication.

As an independent wealth management company, Altavista is compensated only by fees for advice and counsel, and has no proprietary interest in any fund, strategy or the sale of any product.

Our offices are located in Asheville, North Carolina and Charlotte, North Carolina.

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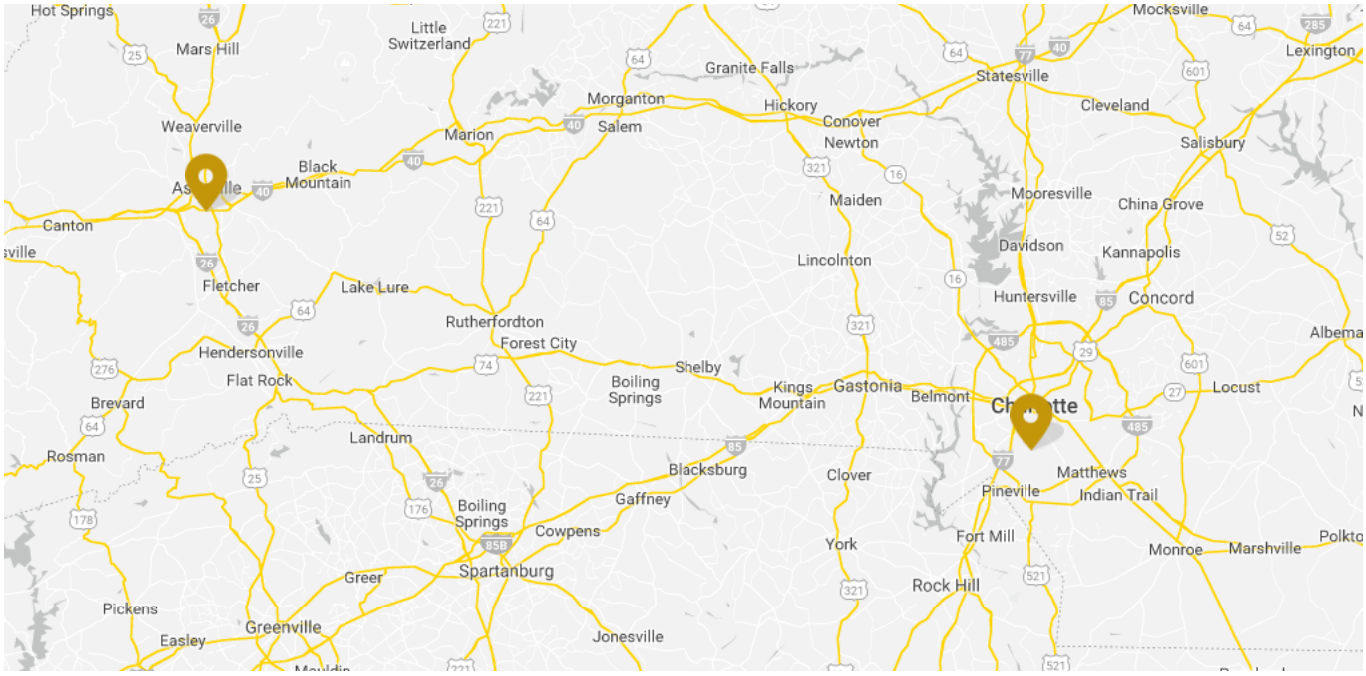

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