



DIFFERENCE

LEADERSHIP

PROCESS

PHILOSOPHY

WHY US

CONTACT

 CLIENT LOGIN

Full disclosure. Transparency. Trust.
Integral elements we bring to
each of our client relationships.

[Learn More](#)



THE PRINCIPAL DIFFERENCE

In the complex and uncertain world we live in today, we believe having a trusted financial advisor has never been more important. Daniel E. Archer, Jr., Brennan G. Cross and Ray B. Tanner, Jr. are the members and managers (Principals) of ACT Wealth Management, LLC. The three Principals at the company work directly with each client. Who knows your situation better than the team who earned your trust and confidence? This is what we call THE PRINCIPAL DIFFERENCE.



TRUST

Our compensation comes only from the advice we provide to our clients. ACT Wealth Management does not receive commissions or 12b-1 fees, does not sell products, and provides full fee transparency. Additionally, we safeguard assets using a third-party custodian.

[Learn More](#)



INDIVIDUALITY

You are not like any other client, so your financial plan and investment portfolio should be unique to you. At ACT Wealth Management, we construct each portfolio based on your needs, goals and risk tolerance.

[Learn More](#)



CONFIDENCE

With over four decades of cumulative investment experience, the Principals at ACT Wealth Management realize that keeping clients informed and educated in all phases of their financial plan and investment portfolio are essential elements in providing confidence.

[Learn More](#)

ABOUT

Throughout our respective careers in the wealth management industry, we have worked closely with affluent clients and institutions on a nationwide basis to deliver complex financial planning, investment and wealth management strategies.

[Learn More](#)

LEADERSHIP



DANIEL E. ARCHER, JR., CFP®

Founding Principal

Dan has over 24 years of experience in financial planning and investment management. He began his career at Merrill Lynch, and later continued at UBS in Dallas, TX. Dan is often asked to speak to individuals, large corporations, and foundations across the country regarding several topics that include defined Benefit/contribution programs and large liquidity events.

Dan graduated from Baylor University with a Bachelor of Business Administration in Financial Services and Planning with an emphasis in Accounting. Dan is a Certified Financial Planner™ focusing his efforts on Investment Research and Portfolio Construction for the firm.

OUR PROCESS

Fact Finding

Financial Modeling

Portfolio Construction

Implementation

Monitoring

Rebalancing

OUR PHILOSOPHY



THE FOUNDATION



Developing a personal relationship with each of our clients is the foundation of our financial planning and investment management services.

IN PERSON MEETING

The process we utilize when meeting with prospective clients has been crucial to the firm's success, organic growth, and client retention. Therefore, we prefer to meet individually with each of our clients, in their home, at their convenience.



NATIONWIDE

We meet face-to-face with clients, and prospective clients, throughout the country to solidify and develop lasting relationships.



TRANSPARENCY



We believe that investment transparency and full fee disclosure are important components of each client relationship.

ONLINE ACCESS

Through online account access, we provide you with comprehensive reports that detail your performance, distributions, fees paid, and asset allocation.



THIRD PARTY SERVICE

Your assets are held through a third-party custodian, who supplies you with important infrastructure services such as trade confirmations, monthly/quarterly

account
statements, and
annual tax
reporting.

WHY CHOOSE US



INVESTMENT & RESEARCH

One size never fits all. A client's investment portfolio is no different. That's why ACT Wealth Management lays the groundwork of each of our client's situations uniquely, with categorical transparency, tactical assessment management, and strategic, tailored, and unbiased investment research.



INVESTMENT COMMITTEE

ACT Wealth Management is not a company driven by specious market trends. Before recommendations are given, quantitative and technical analyses are considered. ACT's principals are responsible for amending the company's global asset allocation model, which informs our clients' risk profiles.

[Learn More](#)

[Learn More](#)



FIDUCIARY STANDARD

The Latin word fiduciary means "trust." Fiduciary is someone who acts in utmost good faith in a client's best interest. ACT Wealth Management follows this fiduciary standard to provide the trust investors deserve.

[Learn More](#)



COORDINATION OF SERVICES

Investment logistics don't have a single endpoint. Thus, the investment constellation is dotted with accountants,



LEGACY PLANNING

The discussion of inevitable life events is never enjoyable, but its role in the planning process is imperative. ACT is committed to providing

attorneys, and other business professionals. As your financial advisor, our duty is to act in your best interest in all matters. ACT serves as your “point person” in coordinating these services.

[Learn More](#)



clients and their families with necessary, objective advice; coordinating with estate planning attorneys, CPAs and life insurance companies when a loved one passes away.

[Learn More](#)

PILOT SERVICES

The principals at ACT have been building lasting client relationships with crew member families of major airlines since 1996. ACT provides a wide-range of services, from complimentary pre-retirement counseling to IRA conversion analysis. Review our full list of comprehensive services below.

CONTACT US

Full Name*

Email Address*

Phone Number

Notes

I'm not a robot reCAPTCHA
Privacy - Terms

Submit



Plano Office

7160 Dallas Parkway
Suite 230
Plano, TX 75024

Raleigh Office

8601 Six Forks Road
Suite 400
Raleigh, NC 27615

Connect



Phone (214) 618-2022

Phone (919) 214-9066

Toll-free (888) 392-9773

Fax (214) 919-4896

Copyright © 2019 ACT Wealth Management, LLC. All Rights Reserved. | [ADV](#) | [Privacy Policy](#)

Investment advisory services offered through ACT Wealth Management, LLC, a registered investment adviser.

This site is published for residents of the United States only. Representatives may only conduct business with residents of the states and jurisdictions in which they are properly registered. Therefore, a response to a request for information may be delayed until appropriate registration is obtained or exemption from registration is determined. Not all services referenced on this site are available in every state and through every advisor listed. For additional information, please Contact Ray Tanner, Chief Compliance Officer, at 214-618-2022 and/or rtanner@actwm.com.