



Summer 2018

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OUR MISSION

To enable our clients to pursue their dreams through excellence in investment management, world-class financial planning, and compassionate engagement.



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ACT Advisors Welcomes Tim Mowrey



Tim Mowrey, CFP®

We have the great pleasure of announcing that Mowrey Investment Management, a Raleigh, NC based fee-only financial planning and investment management firm, has recently joined the ACT Advisors team. Tim Mowrey provides wealth management services with an objective to be the financial “family practitioner” for his clients by developing close relationships, and ensuring their long-term financial health.

We thought you’d like to get to know Tim a little better, so we asked him some questions about his family, his history and why he chose a career path in wealth management.

Q. Tell us about your family.

A. My wife, Sherry, is a Physician’s Assistant and we have five children. Christin (39) is a medical coder, married and lives with her two children on Long Island, NY. Andrea (38) assists her boyfriend in running a cattle farm and lives in Raleigh, with her son. Ryan (34) is an Iraq war vet finishing his degree in accounting, lives in Raleigh and is engaged to be married this September. Phil (33) is an anesthesiologist and lives in Nashville. Maggie (31) is a marketing manager at a high tech firm and lives in San Francisco.

Q. What made you decide to become a financial planner?

A. I have always enjoyed solving problems and figuring things out. I loved doing that as a consultant, but in that career, there is very little continuity with people that you develop a relationship with. In the early 90’s, I had several friends ask me to manage their money for them. I registered as an RIA and over time, I realized that although I made more money doing consulting work, I was much more fulfilled by helping individuals and families. Eventually, I decided to take a leap of faith. “Success” was defined as helping people and being able to pay my bills (which took several years to realize).

Q. Why do you personally feel like financial planning is important?

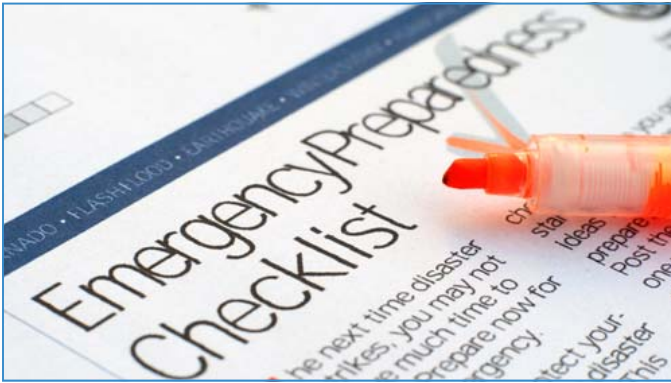
A. Financial planning is important because people have dreams, goals, and responsibilities. Life is filled with surprises; some good, some not so good.

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Tim and his wife Sherry are the proud parents of five (now grown-up) children

In Case of Emergency: Essential Documents to Take with You



Hurricanes, fires, storm surges and other emergencies may make it necessary for you to evacuate your home. First and foremost, the priority in an emergency should be the safety of you and your family. Tracking down important documents (like insurance policies) shouldn't delay leaving quickly and safely.

Ideally, you should have important documents already gathered and stored in a watertight, fire-protected safe as part of a disaster preparedness plan. In addition, you should consider storing electronic copies in your ACT Advisors Vault – a secure cloud storage service - in the event you are not allowed to return to your home after an emergency.

Based on recommended lists from the Red Cross, the Insurance Information Institute and ASPCA, here's some of the documentation that would be good to bring with you, if possible, in an evacuation.

INSURANCE RECORDS

Have on hand everything you'll need to get a claim started quickly:

- ✓ Insurance policies
- ✓ Contact information for your insurer and agent
- ✓ Copy of a recent home inventory

We suggest making a home inventory video and storing it in your ACT Advisors Vault. This video may help streamline the insurance claims process, showing your possessions and the state of your home before the emergency.

CASH

Extra cash is a go-bag must-have in case the power is out and you can't swipe a credit card or access an ATM after the storm.

IMPORTANT DOCUMENTS

Create a grab-'n'-go folder with any papers that might be difficult or inconvenient to replace, such as:

- ✓ Birth and marriage certificates
- ✓ Social Security cards
- ✓ Passports
- ✓ Driver's licenses
- ✓ Wills
- ✓ Deed or lease to your home

MEDICAL DETAILS

The Red Cross recommends taking a seven-day supply of any medications and necessary items, as well as paperwork that can help with getting care, including:

- ✓ Prescriptions
- ✓ Important medical records

PET RECORDS

The ASPCA suggests that you bring a recent photo of your pet in case you are separated, as well as important documents like:

- ✓ Copies of your pet's medical records
- ✓ Up-to-date identification tags for your pet's collar and carrier

Safeguarding Your Important Documents in the Vault

ACT Advisors Vault acts like your online filing cabinet where you can securely store all of your important documents—everything from legal documents, wills, tax returns, audio files, and more. This will give you complete 24/7 access to all of the files in the Vault through any internet connected device. You can also share any documents you choose with your advisor, family, or other professionals like your CPA. If you have not signed up for the vault but would like to be sent a link to register, please email michaela.andersen@lpl.com.

Client Spotlight: John Snowden and Victoria Montgomery with the Military Magnet Academy Foundation



Military Magnet Academy graduation, June 2017. Pictured: Military Magnet Academy staff, Charleston County school officials, commencement speaker and Foundation members and family (center, left to right) Victoria Montgomery, Vicky Snowden and John Snowden.

Civic engagement is a big part of many of our clients' lives. Two of them share the same passion for supporting a local youth program. For the past 17 years, John Snowden has been involved in the Military Magnet Academy of Charleston and has led the Board of the Military Magnet Academy Foundation for 13 of those years. Victoria Montgomery is newer to the Foundation and has been involved for the past three years and currently serves as the Foundation Treasurer.

The Military Magnet Academy is open to any student in Charleston County, grades 6-12, and provides an academically challenging and disciplined environment so that students can thrive regardless of their economic background. Their goals are to move more children to proficient and advanced levels on standardized tests, close the achievement gap between groups, and increase high school graduation rates.

The academy population is currently made up of 98% minority students. For many of these children, the experience they have at the Military Magnet Academy is life changing. It provides structure and opportunities that they never had before. With a graduation rate of 90%, the Military Magnet Academy is proud to lay the foundation for success for so many of their students.

The Military Magnet Academy Foundation plays an important role in all of this. As a 501(c)(3) non-profit organization, they're able to harness the community's generosity and turn it into tangible support for the students enrolled in the school. Under the leadership of John, the MMA Foundation supports cadets with scholarships, uniform purchases, field trip travel expenses, and many other items and activities which enable the students to learn and prepare for leadership.

The MMA Foundation is currently seeking active donors. If you think you'd be interested in becoming involved, John would be happy to hear from you at johnsnowden10@gmail.com. All donations are tax deductible. To read more about the Military Magnet Academy Foundation, you can visit their website at www.militarymagnetfoundation.com.



The Military Magnet Academy opened in 1997 and serves students from across Charleston County

Autumn Adventure Awaits You Traveling Tote Contest 2018



Here at ACT Advisors, we love nothing more than seeing our clients enjoy themselves. What better way to spend your time than traveling and basking in the company of loved ones?

This year, you've taken us along with you to the beach, the polar plunge and even the Swiss Alps!

What adventure awaits you in autumn?? Don't forget to pack your ACT Fanny Pack (or tote bag!), snap a picture and send it to us at nicolette.speziale@lpl.com.

There will be a prize for Best Traveling Tote picture at the end of the year.

Pictured left: ACT client, Heidi, gliding over the Swiss Alps with her ACT fanny pack!

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ACT Advisors Welcomes Tim Mowrey

With a strong, resilient financial plan, people are better able to weather those unhappy surprises and still realize their retirement, education, charitable and legacy goals.

Q. Do you have any pets?

A. Yes, we were "gifted" with an older rescue dog named Cleo. Our daughter, Andrea, found this wounded, sick dog and could not keep it. Andrea played on our heart strings until we agreed to take her.

Q. What made you move to Raleigh, North Carolina?

A. In my former career I was a consultant. I had a couple of clients here in Raleigh, and every time I would fly into the area I would think, "Some day I want to retire to a place like this." One day, I left a blizzard in Buffalo, and landed in sunny, warm (for February), beautiful Raleigh. That was it. I went home and said, "We're moving!"



Cleo, Tim's rescued Treeing Walker Coonhound

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Economic forecasts set forth may not develop as predicted.