35 Years Strong with Act!

How One Financial Advisor Built a Thriving Business with CRM at the Core

A Legacy of Trust and Reliability

For over 35 years, John Nabergall II has been using Act! to manage and grow his financial advisory practice. From early days of hand-written notes to now syncing seamlessly with the cloud, Act! has remained a constant and critical part of his daily workflow.

Despite shifts in technology, John continues to rely on Act! as his CRM of choice, handling everything from contact management to appointment tracking and annual reminders. Act! gives him a structured, searchable system that grows with his business. With each software update, new categories and features offered even more ways to stay organised and deepen client relationships.

"I've been using Act! for 35 years... and I wouldn't leave it!"

All-in-One Relationship Management

As an independent advisor under a parent investment firm, John handles a broad spectrum of client types—personal, corporate, and retirement planning. Act! helps him manage this complexity with ease.

From birthdays to meeting notes and follow-ups, Act! keeps John one step ahead. He creates customised records, logs calls and meetings, and sets up reminders for future engagements—all in one place.

"All of my clients, all of my prospects, all my information go in there. Act! ensures I never miss a detail."

John Nabergall

“Act! has been my right hand for several decades now.”

Outcomes that Speak for Themselves

Using Act! has not only improved John’s organisational habits, but it’s also helped him revisit and reevaluate prospects he might have otherwise forgotten.

John credits Act! for providing the structure he needs to build, nurture, and track valuable client relationships over time—helping him stay top-of-mind and maintain a personalised touch in a competitive field.

“I’d have a visual reminder of a conversation or contact, and it would prompt me to follow up. It just helped me get a better handle and grow all of those relationships.”

Key Takeaways

- **Consistency is Key**
  Act! has remained a trusted companion through decades of business evolution—proof that a reliable system pays off long-term.
- **Total Visibility Into Relationships**
  From first touch to follow-up, Act! provides a complete picture of every client and prospect, helping John stay proactive and personalised.
- **Efficiency Through Customisation**
  John tailors Act! to his workflow—setting up shortcuts, creating custom fields, and organizing key dates—all while working solo.
- **A Platform That Grows With You**
  Even as the software has moved from physical disks to the cloud, Act! continues to evolve, adding features that keep pace with modern needs.

About Act!

More than CRM. Your total relationship solution.
Act! unites sales, marketing, and customer management in one intuitive platform to help you stay organised, attract new customers, and turn relationships into results.

START YOUR FREE TRIAL