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Background & Experience

Comprehensive Planning insurance consultant, Derek Archey, works exclusively with UBS Financial Services advisors. Derek specializes in wealth transfer, business succession, disability income and long-term care strategies.

In June of 1996, Derek entered the financial industry working in the sales department of Bloomberg LP in New York. There he worked with many professionals at all levels of the financial services industry. In 1999, Derek joined Comprehensive Planning of Troy, Michigan, and helped it grow from a Transamerica branch office into a competitive independent general agency. Now he is one of Comprehensive Planning's owners. Derek holds a Life and Health License, FINRA Series 6 and 63, and is a Certified Financial Planner (CFP).

Certifications & Education

- Rutgers University, New Brunswick, New Jersey - B.S. Management, 1996