

WHO DO I CALL?

Unsure which Harbour employee is best for your question? This list will help you figure out who to call!



ATLAS

1. atlas@harbourinv.com
2. Ava ext 710
3. Robbie ext 702
4. Mike ext 726

COMMISSIONS

1. Jenna ext 725
2. Angie ext 712
3. Jim ext 711

DIRECT BUSINESS

INCLUDING MF & VA

1. Rick ext 705
2. Kyle ext 701
3. Dan ext 704

FORMS

1. Kyle ext 701
2. Rick ext 705
3. Dan ext 704

LICENSING

1. Melissa ext 723
2. Megan ext 706
3. Angie ext 712

MARKETING COMPLIANCE REVIEW

1. Jeremey ext 715
2. Rick ext 705
3. Dan ext 704

MORNINGSTAR

1. Robbie ext 702
2. Mike ext 726
3. Jim ext 711

OFFICE TECHNOLOGY

1. Mike ext 726
2. Robbie ext 702
3. Jim ext 711

PERSHING ADVISOR SOLUTIONS (PAS)

1. Jennica ext 717
2. Tony ext 716
3. Kyle ext 701

PERSHING BROKERAGE

1. Tony ext 716
2. Jennica ext 717
3. Kyle ext 701

SCHWAB

1. Angie ext 712
2. Bailey ext 730
3. Julie ext 713

TRAINING

1. Ava ext 710
2. Nikki ext 720
3. Mike ext 726