

WEEKLY COMMUNICATIONS

WWW.HARBOURINV.COM



December 16-31, 2024

THE HOLIDAY SEASON HERE!

WISHING YOU AND YOUR LOVED ONES A JOYOUS HOLIDAY SEASON FILLED WITH WARMTH, HAPPINESS, AND LOVE.

For the quickest response to your questions please remember to use our department email addresses:

ADVISORY@HARBOURINV.COM
ATLAS@HARBOURINV.COM
COMMISSIONS@HARBOURINV.COM
EVENTS@HARBOURINV.COM
LICENSING@HARBOURINV.COM
MORNINGSTAR@HARBOURINV.COM
NEWBUSINESS@HARBOURINV.COM
TECHNOLOGY@HARBOURINV.COM



HELPING HANDS JAMAICA FOUNDATION

Triumphant Basic School Solar Electricity Pilot Project

Deadline to donate is January 3rd!



Donate today to have your dollars matched by Harbour! Nick has generously agreed that Harbour will match 100% of the first \$7,500 raised.

THUS FAR, WE HAVE \$1,825 RAISED FROM OUR ADVISORS!

Benefits of Solar:

- Savings on electricity expenditures can be used for upkeep of the school
- Increased opportunity to use school for evening activities, community outreach & adult learning
- Improved daily water supply through use of on site solar powered water pump

[CLICK HERE TO DONATE](#)

charles
SCHWAB

Schwab Advisor Center Digital Roadmap



Schwab recently updated the Schwab Advisor Center digital roadmap. Follow the link to see what SAC enhancements are set to launch Q1 2025 and beyond.

*The Roadmap also highlight's what has already launched in 2024.

[CLICK HERE TO VIEW THE ROADMAP!](#)

HOUSEHOLD UPDATES



PREPARATION

We are amidst a householding project that will combine clients into appropriate households. This project involves a mass generation of these households and initially, households will not be named as desired (Last, First & First). We will be working with Sycamore to clean up the names with an automated process that runs after the household are initially generated.



IMPLEMENTATION

During this initial implementation, you should NOT be worried if you see an influx of household profiles Friday morning (12/20). These are purposeful and will be renamed correctly as the query processes through them all. This is in efforts to make our household reporting and dashboards more robust and useful to all users.

SUPERVISION

Our Atlas team will be heavily involved in this project and will resolve any issues that arise. Please contact the team if you have any questions: atlas@harbourinv.com



QUIK TRAINING VIDEOS

As many are aware, Quik! is the new application for autofilling forms. Ava has created training videos for the various functions of Quik!. You can find these on Harbour's website, as well as our YouTube channel.

For your convenience, we also have them listed below!

✓ [Creating & Managing Form Bundles in Quik](#)

✓ [Quik! Navigation & Setup Overview](#)

✓ [Filling out Paperwork in Quik!](#)



Questions?
Please contact:

Ava, Mike or Robbie



REMINDER

As a reminder, Harbour has created a new version of the Customer Investment Profile that includes additional information about the identification used by your clients.

This extra information is required by FINRA, so please make sure you are using the latest version of the Customer Investment Profile.

We will stop accepting the older version at the end of the month!

COMPLIANCE CORNER

**HARBOUR'S TEAM IS CURRENTLY 7 MEMBERS STRONG!
JOIN US FOR FUN, FOOD, MILES AND SMILES!**



**JULY 19-26
2025**

HARBOUR'S HOME TALENT TEAM

RAGBRAI 2025

Every year cycling enthusiasts from ALL OVER THE WORLD come together in Iowa for an epic eight-day festival of bicycles, music, food and community. For some riders this is a "Bucket List" event filled with new experiences. For others, this is the event they look forward to year after year. Harbour has created a team for the 2025 ride event and we are inviting you to join us!

Rhonda and Scott will be representing the Home Office and others in the Harbour community have also signed up to join us in Iowa.

Because this is a multi-day event, Harbour is using a charter service to ensure equipment, food, and showers are available each day. Others in the team will self-support using their RV and having a friend ensure the RV moves each day with their riders. What we are saying is there are options available to you.

Join us for a day, a few days, or the entire event. Its up to you how to participate. Anyone interested in joining the Harbour team can contact Scott Conwell at sconwell@harbourinv.com with any questions.

DEADLINES:

- RAGBRAI registration is open until June 11, 2025
- Harbour's charter services for equipment, food and showers:
 - You must sign up prior to 12/31/2024
 - You must register for the charter services after January 1, 2025
 - If you join Harbour's team, Scott will send more information on the charter services and registration info



Happy *Anniversary*

December 18

Mark Thompson - Greenfield, WI

December 29

James Gilbert - Battle Creek, MI



Happy Birthday

December 16

Joe Yard - Bonita Springs, FL

December 18

Laurie Ellis McLeod - Madison, WI

Rachel Hook - McHenry, IL

December 19

Kim Marshall - Sarasota, FL

December 20

Lukas Kolasch - Verona, WI

December 22

Matt Bayer - Kettering, OH

December 23

Corby Kiss - Richland, MI

Nils Egge - St Louis Park, MN

December 24

Tony Catanzarite - South Bend, IN

Kendra Erkamaa - West Des Moines, IA

December 27

Steve Crispigna - Green Bay, WI

