

WEEKLY COMMUNICATIONS

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February 3-9, 2025



NEW ATLAS UPDATES ON WEBSITE



Under the Training & Resources section we have a new Atlas section! Within the Atlas section, you will now find an "Atlas Updates" link.

- The link will bring you to a page with 2 accordion sections.
 - The first offers our 2024 completed items
 - The second offers our most recent updates.

Our team plans to review monthly & add additional info as it's completed. This additional section of our site will keep users up to date with the latest progress we've made with our everchanging system as we continue to improve it.

Questions? please contact our Atlas team at atlas@harbourinv.com

REMINDER TO ALL ADVISORS AND LICENSED ASSISTANTS:

COMPLIANCE CORNER

Please remember to contact our licensing department at licensing@harbourinv.com when you've moved your business address or home address.



SUMMER REGIONALS

★ **SAVE THE DATE** ★

Minnesota - TBD
Madison - June 11 - The Oaks
Green Bay - June 17 - Thornberry Creek at Oneida
Michigan - July 8 - American Dunes

Mark your calendars for our 2025 regionals!

This is a great opportunity to connect with industry peers, gain valuable insights, and enjoy a round of golf on us!

QUIK! UPDATE

Some Quik! news! (No pun intended)

We have completed the data integration between Atlas and Quik!

If you signed up for Quik! and planned to use Atlas as your CRM, you may have already gotten an email regarding getting your Atlas data integrated.

If you have not heard from us and need assistance, email atlas@harbourinv.com.

2025 Reference Guides

Please see the 2025 reference guides provided for Medicare, Social Security & Taxes provide to us by Manning & Napier.

Happy Anniversary

February 6
Lucas Kraft - Brookfield, WI

February 7
Joseph Wilson - Charlotte, MI

February 8
Michelle Caudle - Lac Du Flambeau, WI

Happy Birthday

February 3 Lucas Kraft - Brookfield, WI	February 7 Tony Mennenga - Madison, WI
February 4 Timothy Grzesiak - Mosinee, WI	February 8 Jeff Janeway - Edmonds, WA
February 6 Jason Anger - Oostburg, WI	February 9 Lucas Kane - West Des Moines, IA
Desiree Alexander - Verona, WI	Mark Sweeney - Madison, WI