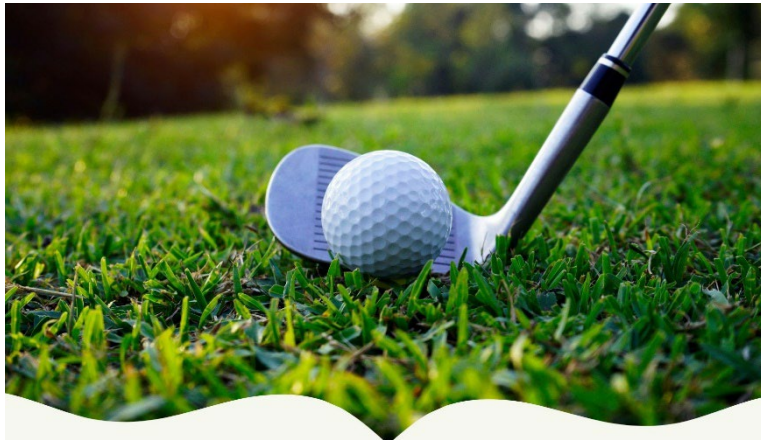


WEEKLY COMMUNICATIONS

WWW.HARBOURINV.COM



March 10-16, 2025



HARBOUR INVESTMENTS SUMMER REGIONALS

2025

JOIN US FOR THIS AMAZING OPPORTUNITY TO CONNECT WITH INDUSTRY PEERS, GAIN VALUABLE INDUSTRY INSIGHTS AND ENJOY A ROUND OF GOLF ON HARBOUR! PLEASE USE THE LINKS BELOW TO SIGN UP!

MINNESOTA - JUNE 3RD

MADISON - JUNE 11TH

GREEN BAY - JUNE 17TH

MICHIGAN - JULY 8TH

SUPER CE LUNCH

Join Terri Sabby to earn 24 WI insurance credits including Ethics along with 15 CFP credits - all while enjoying a delicious lunch at Fleming's in Brookfield.

Registration is required, see the attached flyer for more information

TUESDAY
MARCH 18

11:30 AM-12:30 PM

See the attached flyer for more info or [CLICK HERE](#) to register

WISCONSIN



Updating the Household Profile

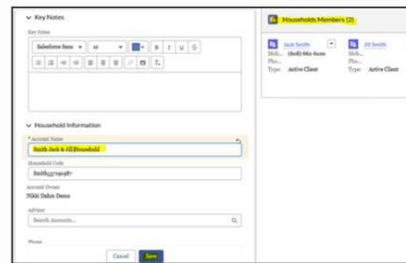


Users can easily update household profile names. After inputting the NAF to add the new member to the household, you can go to that household profile and edit the account name:

- ✓ Search for household profile to update
- ✓ Click on pencil icon in "Account Name" field



- ✓ Update the household name based on the members then click "Save"



This should be completed any time you add a new person to an existing household.



COMMISSION HOLDS

We have noticed an increasing number of small commissions on hold due to paperwork deficiencies. To streamline our processes and improve efficiency, we are implementing a new policy regarding Harbour retaining these held commissions if they remain unresolved for an extended period.

Effective March 31st, any held commissions from transactions not resolved within the timeframes below will be retained by Harbour:

- \$0.01 to \$5 = 60 days (2 months)
- \$5.01 to \$10 = 180 days (6 months)
- \$10.01 to \$50 = 1 year (12 months)
- \$50.01 and Over = 2 years (24 months)

We encourage you to review any outstanding commissions and remain diligent in resolving any paperwork deficiencies.



SUPER CE FOR WI Advisors

24 hours of WI CE

10 hours of CFP CE

Please see the attached flyer for more information and to sign up for Lincoln's super CE!



3/25/2025

AT 9.00AM

4/1/2025

AT 9.00AM

Branch Manager Updates

As part of Harbour's ongoing efforts to keep Atlas up to date, we are asking each branch manager to review, update and/or add any missing information about the branch's office members.

Tomorrow, branch managers will receive an email asking for this information. Please follow the instructions (in the email & on the Atlas page) to provide this. We also made a [step-by-step video](#) to guide you.

Reach out to rwuetrich@harbourinv.com or compliance@harbourinv.com with any questions



CAPITAL GROUP® | **AMERICAN FUNDS®**

NEW AMERICAN FUNDS/CAPITAL GROUP ETF MODELS

Capital Group has released a new set of ETF models with their lineup of ETFs.

These models are available for advisors to trade on their own or apart of the Harbour Traded Model (HTM) platform.

Any questions, please contact Dan Wipperfurth or your American Funds wholesaler directly.



Happy Anniversary

March 12

Thomas Bodin - Waukesha, WI

March 13

Travis Gaskell - Viroqua, WI



Happy Birthday

March 10

Daniel Osborn - Rockford, IL

March 12

Michael Fishman-Salnick - Milwaukee, WI

March 13

Amy Peirce - St. Joseph, MI

March 14

Jonathan Pyncheon - Fort Wayne, IN

March 16

Robert Groves - Appleton, WI

