

WEEKLY COMMUNICATIONS

WWW.HARBOURINV.COM



March 17-23, 2025

LAST CALL!

SUPPORT STAFF CONFERENCE 2025

REGISTRATION CLOSES THIS FRIDAY, MARCH 21 @ 5PM

Monday:

- **Atlas**
 - Reports
 - Best Practices
 - Past & Future Updates
- **Small Group Discussions**
 - Best Practices for Client Onboarding
 - Client Interactions & Experiences
 - Meeting Preparation
 - Team Communication

Tuesday:

- **General Session**
 - See Vang - Schwab Service Team Manager
- **Best Practices for Harbour Paperwork**
- **Best Practices for Assistant Roles**
- **Licensed Assistants vs. Non-Licensed Assistants**
- **Atlas Customization**
 - Dashboard Customization
 - Reports
 - Workflow

TUESDAY Keynote speaker - Christi Andringa

- Work/Life Balance
- Leave Your Issues at the Door
- Learn more about Christi Andringa [HERE](#)



2025

HARBOUR INVESTMENTS SUMMER REGIONALS

JOIN US FOR THIS FANTASTIC OPPORTUNITY TO CONNECT WITH INDUSTRY PEERS AND GAIN VALUABLE INSIGHTS! USE THE LINKS BELOW TO SIGN UP!

MINNESOTA - JUNE 3RD

MADISON - JUNE 11TH

GREEN BAY - JUNE 17TH

MICHIGAN - JULY 8TH



PACER ETFs

TRENDPILOT SERIES

Looking for another option when it comes to providing downside mitigation, Pacer ETFs offers their Trendpilot Series of ETFs. These ETFs move between being 100% Equity Exposure, 50% Equity Exposure or 0% Equity Exposure based on the 200 Day Moving average of the Index the ETF is tracking. For example, its ETF Symbol PTLC (US Large Cap) has moved to a 50% Equity Exposure due to its Index (S&P 500) closing 5 consecutive days below its 200 Day Moving average. See Attached Fact Sheet or go to their website [HERE](#)

Happy Anniversary

March 19

Robert Packard - Oregon, WI

March 22

Craig Anderson - St Joseph, MI

