

WEEKLY COMMUNICATIONS



WWW.HARBOURINV.COM

March 24-30, 2025

NEW ATLAS FUNCTIONS

Users now see review pages on their submissions!

You're able to:

- ✓ Review Your Submissions
- ✓ Edit Before Submitting
- ✓ Retract a Submission
- ✓ Re-submit for Approval

Need to edit before submission?

- Click "Previous" to fix.
- Click "Next" on the review page to generate & submit the submission to Harbour for approval.

Need to retract a submission to make changes?

- Use the recall function

Step Name	Date	Status	Assigned To
Admin Direct Appro...	3/27/2025, 7:47 AM	Pending	Administration Direct...
Approval Request St...	3/27/2025, 7:47 AM	Submitted	Nikki Dalton Dem...

CLICK HERE for a video on the Recall Function!

Ready to resubmit after retracting a submission?

- Click "Submit for Approval", to resubmit for approval.

Questions? Contact our Atlas team: atlas@harbourinv.com



Compliance Corner

Update Your Account Beneficiaries

Do your clients have individual or joint accounts? Simplify the transfer of their assets to beneficiaries by converting these accounts to Transfer on Death (TOD) accounts. This ensures the assets bypass the estate process, avoiding probate delays.

With TOD accounts, you have a greater opportunity to retain assets, as they must be transferred to a new account in the beneficiary's name. This creates a chance to connect directly with each beneficiary, rather than solely with an estate executor. This increases the likelihood of building long-term client relationships with their beneficiaries.



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

BRING A FRIEND

To Regionals!!

Harbour is in growth mode! Do you know a fully licensed producing advisor that would be a great fit for Harbour?

Bring them with you to one of our regionals and you will both receive a gift valued over \$50!

FREE GIFT FOR YOU AND YOUR GUEST

MINNESOTA - JUNE 3
MADISON - JUNE 11
GREEN BAY - JUNE 17
MICHIGAN - JULY 8

CONTACT MEGAN FOR MORE INFO

Golf in Madison, Green Bay or Michigan



HARBOUR INVESTMENTS, INC.
ANNUAL CONFERENCE

WELCOME!

AARON HACER
PRESIDENT

Save the Date

HARBOUR INVESTMENTS CONFERENCE 2025

SEPTEMBER 15-16, 2025

KALAHARI RESORT
1305 Kalahari Dr
Wisconsin Dells, WI 53965

COMPLIANCE
Best practices, navigating financial regulations & Cybersecurity.

NETWORKING
Prime networking opportunities with our incredible group of advisors.

HARBOUR TEAM
Visit with our team! This is the best opportunity to meet our home office staff & learn of the state of Harbour.

TECHNOLOGY
Meet with the latest technology vendors & learn more about AI in our industry.

INVESTMENT STRATEGIES
Commercial-Style Presentations to help you learn the about the latest products and investment strategies

SAVE THE DATE
More information coming soon!

Happy Birthday

March 25
Chris Swenson - Sun Prairie, WI

March 26
Kevin Seufzer - Greenfield, WI
Todd McCaffray - Edmonds, WA

March 27
Steve Ratajczak - Oostburg, WI

March 28
KC Kauth - St Paul, MN

March 29
Jesse Melichar - Verona, WI

Happy Anniversary

March 27
Ken Rumbaugh - Lima, OH

March 28
Philip Brandt - Kalamazoo, MI

March 30
Larry Smith - Baraboo, WI