

WEEKLY COMMUNICATIONS

WWW.HARBOURINV.COM



April 21-27, 2025

INDEPENDENT. And Staying That Way

Our industry continues to be disrupted with consolidations – Commonwealth recently being acquired by LPL and Securities America absorbing into Osaic. We remain proudly independent and committed to the values that built our firm: personalized service, advisor-first support, and real partnership.

We know how connected financial advisors are across firms, and right now, many are looking for a better home. If you know someone who's feeling the effects of these recent changes—or simply ready for a new chapter—we'd love to talk.

We've made it easier than ever to refer a colleague with information added for our current advisor's access within our Recruiting & Referral section of our website. This includes details about our referral bonus program. [CLICK HERE](#) for additional information.

And when you're ready to share more about what makes our firm different, we've added a dedicated resource section designed for potential recruits [HERE](#).

Together, we can offer more advisors the freedom and support they truly deserve.



Welcome

Josh Zoerner & his team at Zoerner Financial just celebrated their first 3 months with Harbour Investments!



HUGE Thank you to Pulera Financial Services for the referral!

*Zoerner Financial
Kenosha, WI*



TULUM 2026 ADULTS ONLY

UNICO - RIVIERA MAYA

10 DAYS - January 7-17, 2026
7 DAYS - January 10-17, 2026

If you're craving sun, sand, and something seriously special, you must join us for this trip! This resort provides high-end indulgence with exceptional dining, expanded activities, and premium accommodations.

We encourage early registration for the best selection of rooms. Additional fees apply for 2 queen beds due to limited supply.

	7 Day - Single	7 Day - Double	10 Day - Single	10 Day - Double
Tropical	\$4,800	\$5,200	\$6,750	\$7,200
Ocean View	\$4,850	\$5,300	\$6,950	\$7,400
Ocean Front	\$5,950	\$6,400	\$8,450	\$8,900

CONTACT US [HERE](#) FOR MORE INFORMATION & TO BOOK!

COMPLIANCE CORNER



FOLLOW UP

In the financial industry, following up is more than just a best practice — it's a necessity. Whether it's after a client meeting, submitting paperwork to Harbour, or confirming expected commissions or fees, diligent follow-up can save time, preserve client relationships, and even prevent significant financial losses.



TRADE ERRORS

This is especially true when it comes to placing trades. Harbour has recently encountered a few trade-related errors that created uncomfortable and avoidable situations. In today's volatile markets, even a short delay in addressing an unfilled trade can result in substantial costs. Please be extra cautious when entering trades, and just as importantly, follow up promptly to confirm that the transaction was executed correctly. A few minutes of follow-up can make a world of difference.



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

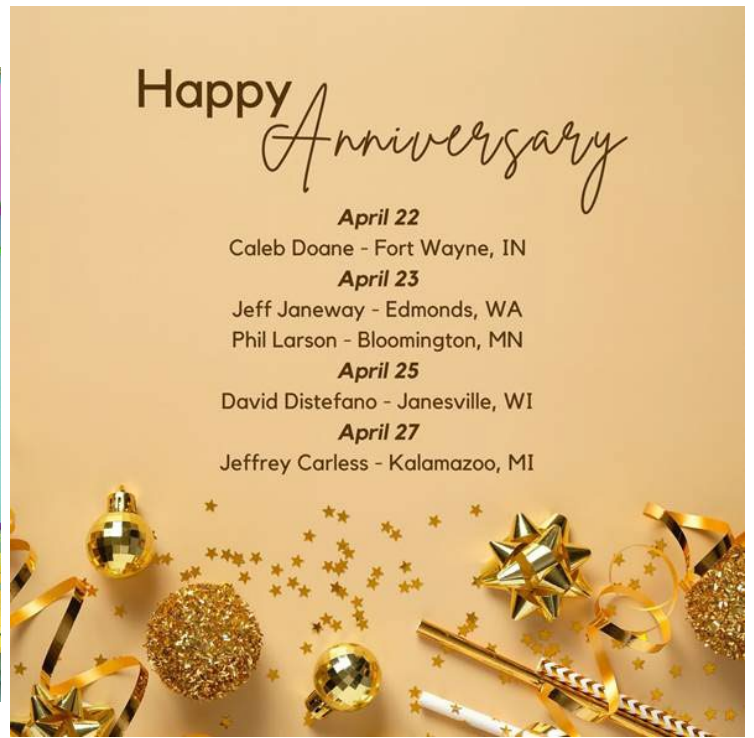
MICHIGAN - JULY 8TH



Happy Birthday

April 22
Lloyd Mennenga - Madison, WI
Jakob Patch - Beloit, WI
April 23
Joshua Zoerner - Kenosha, WI

April 25
Donald Gross Jr - Waukesha, WI
April 27
Clayton Tyree - Elm Grove, WI



Happy Anniversary

April 22
Caleb Doane - Fort Wayne, IN
April 23
Jeff Janeway - Edmonds, WA
Phil Larson - Bloomington, MN
April 25
David Distefano - Janesville, WI
April 27
Jeffrey Carless - Kalamazoo, MI