

WEEKLY COMMUNICATIONS

WWW.HARBOURINV.COM



March 31-April 6, 2025

2025 ADV Brochures



The updated 2025 ADV Brochures are available on Harbour's website.

Advisors should begin use of the 2025 ADV Brochures immediately if you have not already.

Please discontinue any use or distribution of the 2024 ADV Brochures.

NEW UPDATE



Helping Hands Jamaica Foundation

Prior to the January Harbour trip to Jamaica, we teamed up with Helping Hands Jamaica Foundation (HHJF) to give back to the area we were traveling to. We asked for monetary donations to help launch a solar project at the Triumphant Basic School which several of our trip attendees were able to visit while in Jamaica.

Thanks to the incredible generosity of the Harbour family, we raised an amazing \$28,475 for HHJF and were able to fully fund the solar project with additional funds left over to put towards other needed projects in Jamaica. In addition to sponsoring the solar project at Triumphant School, Harbour is now officially the proud sponsor of the Lower Buxton School Restoration Project in Jamaica.

Click here to see a special message from HHJF thanking us for our donations towards the Lower Buxton project. HHJF has been amazed by our support and will update us on the progress of the solar project as things are finalized.

THANK YOU!



NAF COMMISSION HOLD RELEASE

If you receive communication from Harbour that a financial account has a commission hold due to missing a CIP, there is a way to notify Harbour via a NAF to release that hold! When entering a NAF, you will see another question at the bottom of the financial section of NAFs:

Is this NAF for commission hold release?
Financial Account for Hold Release

When you click the checkbox next to "Is this NAF for commission hold release?", a textbox is generated for you to type the Financial account number to release.

Our team will release the hold and should notify you via chatter once done. Please [Contact Us](#) with any questions.

HTM SUBMISSIONS

We have a new submission type that allows users to manage established Harbour Traded Models (HTM) in Atlas!

Under the Home Office Request box, you will see a new request type labeled "Harbour Traded Models."

NOTE: this is meant for prior established HTM accounts. It allows users to submit home office requests for raising cash, changing investments strategies, and so forth.

If you would like to open a new HTM, please reach out to our advisory team rather than using this submission type.

- Watch the training video [HERE](#)
- Questions about our Harbour Traded Model? Contact: advisory@harbourinv.com.
- Questions about the HTM Submission? Contact: atlas@harbourinv.com.



[CLICK HERE](#) to see what your current headshot is!

HEADSHOTS ON OUR WEBSITE



WE'RE LOOKING TO UPDATE OUR WEBSITE WITH OUR ADVISOR'S MOST RECENT HEADSHOTS!

PLEASE [CLICK HERE](#) TO EMAIL US YOUR UPDATED PHOTO

LOOKING TO UPDATE YOUR HEADSHOT?
WE WILL HAVE A PHOTOGRAPHER AVAILABLE AT THE CONFERENCE IN SEPTEMBER!



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!

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



FREE GIFT
FOR YOU
AND YOUR
GUEST

Minnesota Cruise



Happy Birthday

April 1
Christopher Yard - Maple Grove, MN

April 2
Shane Roth - Verona, WI

April 5
Mason Holin - Madison, WI

Happy Anniversary

March 31

Adam Hub - Coon Rapids, MN
Carla Zevnik-Seufzer - Greenfield, WI
Cassandra Brashier - Bloomington, MN
Kevin Seufzer - Greenfield, WI
Kimberly Schreiber - Milwaukee, WI
Trish Beine - Greenfield, WI
Tom Stauffacher - Monroe, WI
Desiree Alexander - Verona, WI

April 1

Kyle Pahnke - Middleton, WI
Amanda Norris - New Castle, IN

April 2

Jay Hinkens - Middleton, WI

April 4

Will Herding - Phoenix, AZ

April 5

Jackson Bush - Kokomo, IN

