WEEKLY COMMUNICATIONS

HARBOUR INVESTMENTS, INC.
Registered Investment Advisor & Independent Broker Dealer

WWW.HARBOURINV.COM

May 12-18, 2025

Harbour Interns

Summer 2025

ATTENTION: Madison area advisors!

This summer, Harbour is excited to welcome three interns. As part of their development, we're looking for Madison-area offices willing to host interns in the month of July!

Offices will receive details from Harbour ahead of their visit, and interns will come trained in Atlas and other systems so they can help with projects or paperwork, if needed.

HARBOUR INVESTMENTS, INC.

If you're open to mentoring interns, please contact Julie, Scott, or Ava at the home office. We're happy to work around your availability and provide all necessary details in advance.

ILLINOIS & WISCONSIN SUPER CE

PACIFIC LIFE

Are you in need of Insurance, CFP, CIMA, or CRPC continuing education credits? Would you like to receive a copious amount of CE credits, in a very short period of time?

If yes, Pacific Life cordially invites you to attend their Super CE event from 11:30am - 1pm on Tuesday, June 17th @ Maggiano's Little Italy in Wauwatosa, WI.

This Super CE event will include **24 WI CE credits (including 3 ethics) and 12 IL credits** - please see attached invitation and use the link to register. They only have a set number of spots available and once they're filled, the event will be maxed out. A private room in the back of the restaurant will be reserved and lunch will be served.

NEW WARNING ADDED TO SUBMISSIONS

Users will now see an additional warning listed on the review screen within the submission process:

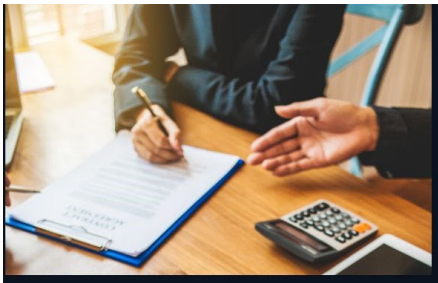
NOTICE: Clicking next will generate your submission. Be sure to review what you've inputted.

This added step is intended to help reduce duplicate submissions. Once you reach the "Upload Files" button, your submission has been received by Harbour.

If you need to make changes after submitting, please contact us at atlas@harbourinv.com.

ATLAS
HARBOUR INVESTMENTS, INC.

We are still working with developers on having the "Previous" button added to the NAF process. We apologize for the delay, and we appreciate your patience.



SIGNATURE GUARANTEE REQUESTS

We've recently seen an increase in requests for signature guarantees on digitally signed documents. Please note that we are only able to guarantee wet signatures. This includes either an original wet signature or a copy of one. Unfortunately, we cannot process or guarantee digital signatures (e.g., Adobe Sign, DocuSign, etc.).

For a signature to be guaranteed, we must have a wet-signed CIP or CPM on file, as the guarantee is based on that signature.

MyRepChat Users

Upcoming Change to MyRepChat Billing:

To streamline the billing process and resolve recent issues, Harbour will begin paying MyRepChat invoices directly starting next Wednesday, May 21.

A commission deduction will be applied to cover the cost. If your branch requires a different billing arrangement, please contact Jim.

MyRepChat

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