WEEKLY COMMUNICATIONS

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

June 2-8, 2025

ATLAS
HARBOUR INVESTMENTS, INC.

NAF UPDATES

We've worked closely with our developers to improve the Joint NAF process for our users. Enhancements include a new "Previous" button and a more intuitive way to enter Joint NAFs.

Ava has recorded short walkthrough videos to show you how the updated process works:

Joint NAFs for Brand New Clients

Joint NAFs for Existing Clients

DASHBOARD UPDATES

ATLAS

We will be revising and updating advisor and assistant dashboards this summer. If you notice one is not working temporarily or reporting different data than normal, it is likely due to us updating things in the background.

Feel free to reach out; but just know it is likely purposeful/being actively remedied.

HARBOUR INTERNS

We are still looking for advisor offices who are interested in taking on interns this summer. If you are interested, please let Julie, Scott or Ava know.

We are flexible and willing to work with what is needed – it's a great way to get some help with summer projects!

NEED SUMMER HELP?

Harrison Hellen was a Harbour intern last summer and is looking to gain more internship experience after a last-minute change in his summer plans recently. If your office is in the Madison area and looking to hire some summer help, please reach out to Harrison Hellen.

Harrison just completed his Junior year at UW Madison pursuing a personal finance degree with CFP track and minor in computer science.

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Harrison Hellen