WEEKLY COMMUNICATIONS

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

WWW.HARBOURINV.COM

August 11-17, 2025

NEW Advisory Agreement Tracking

ATLAS
HARBOUR INVESTMENTS, INC.

Our Atlas team has created an internal workflow as a powerful enhancement that makes tracking your Advisory Agreements incredibly transparent and efficient. With the introduction of these three new submission statuses for our internal processing team, users can now follow the billing setup journey of their advisory agreements on their dashboards.

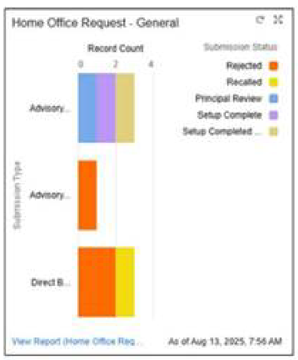
Here's our internal process:

Step 1 - Principal Review
First, the advisory agreement has a review by Principals to ensure it's in good order and ready for billing setup.

*Step **2 - Setup Complete***
Our internal team processes the form and initiates billing in Morningstar.

Step ***3 - Setup Completed & Reviewed***
Final confirmation that billing has been successfully set up and reviewed for accuracy.

This internal workflow is now live which means advisors will now see updates on the Status Tracking Dashboard. This dashboard provides real-time visibility into each step of the internal process. See the two examples below:



Submission Type	Submission Status	Home Office Request: Home Office Request	Home Office Request: Created Date	Advisor/Branch	Client	Subject
Advisory Agreement (3)	Principal Review (1)	CMP-125802	8/13/2025	Deltoto Michael - 883	Frank H Testing	Adv Agr
	Subtotal					
	Setup Complete (1)	CMP-124826	8/5/2025	Deltoto Michael - 883	Frank H Testing	Test
	Subtotal					
	Setup Completed & Reviewed (1)	CMP-124816	8/5/2025	Deltoto Michael - 883	Frank H Testing	TEST Adv Agr
	Subtotal					
Subtotal						

Please contact advisory@harbourinv.com with any questions about your agreements

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1 HOUR CE CREDIT

WI ADVISORS LUNCH & LEARN

Three of the biggest retirement decisions clients need to make involve Social Security, Medicare, and long-term care. It is important to help clients understand the options available for enhancing their Social Security benefits and to develop strategies for covering health care in retirement knowing that Medicare only pays for a fraction of the overall costs.

Guest Speaker:
Waldean Wall, MSFS, ChFC®
Vice President, Advanced Markets & Solutions

Topic:
The Big Three:
Social Security, Medicare, and Long-term Care

Wednesday, August 27th
11:30 am – 1:30 pm Central

Cooper's Hawk
1611 Deming Way
Middleton, WI 53562

Register today to learn more about:

- Helping clients understand Social Security options for enhancing their benefits
- Strategies for covering health care costs especially if long-term care would be needed
- How decisions made may also impact caregivers and survivors

CLICK HERE TO REGISTER