WEEKLY COMMUNICATIONS

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

WWW.HARBOURINV.COM

September 1-7, 2025

NAF REMINDER

CIPs & EIP's are to be submitted separately from vendor paperwork using a NAF submission.

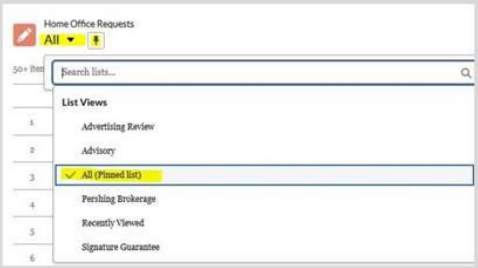
We've recently seen an increase in submissions where CIPs/EIPs are included with vendor paperwork. When this happens, and the CIP is not entered via NAF, the entire submission may be at risk of rejection.

List View Reminder

When looking at submission lists in Atlas, ensure you have the "All" list selected to see all submissions made by anyone associated with you. Many users are defaulted to the "Recently Viewed" list, which only shows submissions you've clicked into not including your support staff.

To Change the List View:

- Click on the drop-down menu
- Click "All."
- Click the pin icon to "pin" that All list view – that way, you will see ALL submissions when coming back in the future.



HARBOUR INVESTMENTS ANNUAL SURVEY

We again are conducting our Harbour Investments annual advisor survey, and your input is appreciated.

This annual fixture is critical to better serve you as our advisors in this ever-changing financial industry.

CLICK HERE TO START THE SURVEY

This survey will also be made available on the Harbour website and through a QR code at the annual conference as well. In an effort to increase responses before and during the conference, we will hold a prize drawing for those that complete the survey before the end of the conference.

Please ensure you only complete the survey once