

# WEEKLY COMMUNICATIONS

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January 12-18, 2026

## 36 Month Emails & Letters Dashboard Update

The 36 Month Emails & Letters Report (on the Status Tracking Dashboard) is now updated to reflect the clients that are due for a 36 month email/letter in Q1 2026.

**Please review these by 3/31/2026. After that, Harbour will proceed with sending emails/letters, unless an exception needs to be made.**



As a reminder, we have a [video](#) showing you how to mark any exceptions for clients that should not receive these emails/letters. Please see the attached instructions from that video.

Reach out to [atlas@harbourinv.com](mailto:atlas@harbourinv.com) with any questions.

### Bonus Tip

If you use a CRM, it can be incredibly helpful to "tag" your clients based on the specific fund they belong to. This will allow you to effortlessly identify and communicate with groups of clients in each particular fund, ensuring that you are always organized and precise in your client interactions.

## INTERVAL FUNDS: AVOID COSTLY TRADE ERRORS

Why this matters: Interval funds are inherently illiquid. Redemptions occur only during scheduled repurchase windows and often require advance notice. Missing a window—or submitting late/incorrect instructions—leads to complex trade corrections that may result in out-of-pocket costs and often trigger client complaints. (Review our E&O responsibilities for trade corrections and coverage limits.)

### ADVISOR ACTION ITEMS (DO THIS NOW):

- **Calendar it:** Add recurring reminders at least 5-7 days before each fund's repurchase window and any advance notice cutoff.
- **Verify specifics:** Confirm each fund's timetable and the required notice period in the prospectus/repurchase offer.
- **Document client intent:** Obtain written instructions and retain confirmations.
- **Coordinate early:** Work with the Transactions Desk before the window opens; double check forms, share classes, and custodian requirements.
- **Close the loop:** Confirm execution with the client and note it in the file.



## MARTIN LUTHER KING, JR. DAY

I HAVE A DREAM  
JANUARY 19, 2026

In observance of Martin Luther King, Jr. Day  
Harbour Investments & the markets will be closed

## SHILOH HORIZONS UPDATE

RAISED AT HARBOUR'S CONFERENCE - \$28,924,79

- LAND DEVELOPMENT - \$8,377.34
- MEDICAL AID - \$20,500.00
  - THIS EQUATED TO 27 C-SECTIONS AKA 54 LIVES SAVED & ASSURED A SAFE DELIVERY FOR MOTHER AND CHILD
- SHILOH HORIZONS EMPOWER WOMEN SPONSORSHIP - \$4,735

### ADDITIONAL DONATIONS:

- HARBOUR INVESTMENTS DONATED \$7,500
- NICK/AARON DONATED ANOTHER \$10,000
- ONE OF OUR ADVISORS IS DONATING \$500/MONTH

### WHAT'S NEXT?

- CONTINUATION OF THE LAND DEVELOPMENT PROJECT
  - THIS PROJECT COSTS \$73,000
- COMPLETING THE BATHROOMS
- BEGIN KITCHEN DEVELOPMENT
- FINAL STAGE OF THE LIVING QUARTERS



TOGETHER WE HAVE RAISED OVER \$40,000



Happy Birthday!

**January 15**  
Joel Radakovitz - Machesney Park, IL

**January 16**  
Jennifer Johnson - La Crosse, WI

**January 18**  
Erik Zuberbuhler - Freeport, IL

Happy Anniversary!

**January 12**  
Shafer Oshefsky - Luxemburg, WI

**January 17**  
Dan Byrens - Battle Creek, MI

**January 18**  
Neal Rohrs - Charlotte, MI