WEEKLY COMMUNICATIONS

WWW.HARBOURINV.COM

Harbour Investments, Inc.
Registered Investment Advisor & Independent Broker Dealer

February 9-15, 2026

BLACK DIAMOND UPDATE

Black Diamond WEALTH PLATFORM

We're pleased to share that access to Black Diamond is now available for all Harbour advisors and their support teams. Login invitations were emailed earlier this afternoon and include a personalized link to access the platform. The email will appear from "Harbour Investments, Inc." with the sender address noreply@bdreporting.com. Please note that these links expire after seven days, though new invitations can be issued at any time.

Once you've logged in, we encourage you to explore the training resources available within Black Diamond to help you get started. As a helpful first step, we recommend reviewing the additional materials on the Harbour website— including onboarding guidance, pricing, integrations, and FAQs—located under Training & Resources → Black Diamond.

Harbour will also be hosting town-hall style training sessions in the coming weeks, and we'll share dates and details soon.

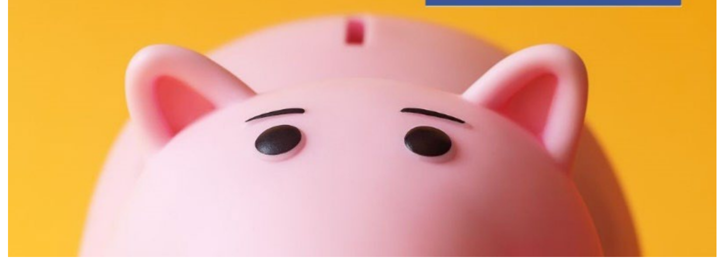
If you have any questions, please contact the Harbour Home Office or email our dedicated Black Diamond support inbox at blackdiamond@harbourinv.com

New Compensation Reports in Atlas!

You'll find these reports under the "Compensation" tab which is located to the right of the Analytics Compensation Report in Atlas.

Questions? Please reach out to atlas@harbourinv.com

Compensation Report | Compensation
- Summary Compensation Report
- Detail Compensation Report
- Advisor/Branch Summary
- On Hold-All Report
- Compensation Export-Payout (RT) Report



New Business Email Reminders

What Is Its Purpose?

Newbusiness@harbourinv.com should be used for:
- **All Docusign envelope copies**
- **Direct Business Paperwork processing status questions**

What Shouldn't Be Sent There?
- **Wet signed client paperwork**
- **Signature guarantee requests**

Both of these items should be submitted by the advisor/assistant through Atlas.

Don't Have Time to Upload Docs to Atlas?

Our Virtual Assistant program is happy to help!

Please see the attached PDF for more information.

Update to Schwab Alliance Online Access Defaults

Beginning this week, when a client enrolls in online access for a new Schwab account, the default display setting will be Limited View. Limited View removes trading and money movement capabilities that were previously available under the Standard View, which had been the default setting.

Schwab Alliance web view settings can be changed at an account level by going to the profile tab in Schwab Advisor Center under preferences.

For additional customization options and details regarding Schwab Alliance access, please refer to the Schwab Service Guide.

Home Office Request Subjects

When entering Home Office Requests- **in the Subject line, please enter the Company Name, type of account, & any other supporting documents that are included in the attachment.** This helps ensure we find the correct paperwork for each client account.

A few examples:
- Schwab Rollover IRA App
- Schwab IRA Distribution
- FT IRA App
- AF Individual App
- AF UTMA App - *goes under minor's profile*
- AF Beneficiary Claim - *goes under beneficiary's profile*

Home Office Requests
* Advisor or Advisor Group: Advisor Joe
* Client: Mary G Testing
* Subject: AF IRA App, Transfer, LOU


Happy Birthday!
February 9
Mark Sweeney - Madison, WI
February 10
Larry Smith - Baraboo, WI
February 14
Susan Olson - Sun Prairie, WI
February 15
Rodney Engh - Viroqua, WI
Nathan Baumann - Holland, MI


Happy Anniversary!
February 10
Mark Santas - Beloit, WI
Bill Dijak - Saginaw, MI
Bryan Graczyk - Saginaw, MI
February 11
Greg Volitich - Carnegie, PA
February 12
Stuart Friberg - Menomonee Falls, WI
Roger Hellenbrand - Verona, WI
February 14
Daniel Osborn - Rockford, IL