

WEEKLY COMMUNICATIONS

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March 9-15, 2026

Extension Options



2026 AVALON WATERWAYS CRUISE

RSVP DUE FRIDAY, MARCH 20 2026

As we continue planning for our 2027 Avalon Waterways Danube Dreams Cruise, we're exploring several optional pre & post cruise land extensions including some exclusively for Harbour guests.

Please take a few minutes to review the attached PDFs, which include the full itineraries and details for each land extension option, if interested, then fill out our survey [HERE](#). Once we have a sense of interest, we will be able to share exact pricing and next steps.

All land extensions include:

- 4 out of 5-star hotels
- Two pieces of luggage per person
- Two drinks included with each meal

Please note that flights are not included, and land extension pricing will be in addition to the cruise cabin cost previously shared.

Questions? Contact events@harbourinv.com



Meeting Details
March 25th & 26th



Nationwide®

UPCOMING WISCONSIN SUPER CE

Wednesday & Thursday, March 25th & 26th, Nationwide is holding some quick Super CE courses around the state of Wisconsin that they would love to have you attend! ***Please note this is only for Wisconsin advisors**

Each of the 3 meetings will begin with a quick **Nationwide product update** and you'll hear from **Ryan Burcham from Janus Henderson regarding 'Amplifying Human Intelligence'**. How wealth advisory teams can leverage AI to elevate creativity, critical thinking, organization and adaptability.

This will be followed by a short quiz and once complete you will leave having accomplished all **24 of your Wisconsin Insurance Credits – including Ethics**.

Designation Credits

- ✓ 24-CR INSURANCE CE (includes ethics)
- ✓ 15-CR IWI® CE (CIMA/CPWA)
- ✓ 15-CR CFP® CE (General only)
- ✓ 6-CR IAR® CE (Ethics)
- ✓ 15-CR CFFP® CE (CRPC/CRPS)
- ✓ 24-CR AMER COLL® CE

Space is limited, see the attached flyers for more info
Register ASAP using the attached invitations by clicking the blue link

COMPLIANCE CORNER



Regulatory agencies are intensifying enforcement around UTMA accounts where the minor beneficiary has reached the age of majority, but the custodian has not been removed.

Advisors should review all client UTMA accounts to confirm they comply with the applicable state requirements. In many states, the custodian must be removed before the beneficiary turns 25, while others require the change by age 21.

Failure to make this update in a timely manner has led to **substantial fines** for non-compliant advisors and broker-dealers.

Charles Schwab Newsletter Premier Wealth Group 12

See the attached newsletter for the latest updates and tips from Schwab!

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charles SCHWAB

2026

REGIONAL MEETINGS

CLICK EACH DATE BELOW TO SIGN UP!

2
JUNE

Minnesota at The 6Smith

Dinner in the Revel Room with panoramic views of Lake Minnetonka and the Boat Works Marina.

16
JUNE

Madison, WI at The Oaks

Morning presentations, followed by lunch, an afternoon of golf, and dinner at the course.

30
JUNE

Green Bay, WI at Thornberry Creek

Morning presentations, followed by lunch and an afternoon of golf.

28
JULY

Michigan at American Dunes

Morning presentations, followed by lunch and an afternoon of golf.



Happy Birthday!

March 9

William Gardner - Madison, WI

Mark Herding - Phoenix, AZ

March 10

Daniel Osborn - Rockford, IL

March 12

Michael Fishman-Salnick - Milwaukee, WI

March 13

Amy Peirce - St Joseph, MI

March 14

Jonathan Pynchon - Fort Wayne, IN

Happy Anniversary!

March 12

Thomas Bodin - Waukesha, WI

March 13

Travis Gaskell - Viroqua, WI

