

# WEEKLY COMMUNICATIONS

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April 13-19, 2026

## SS&C | Black Diamond CLEAN UP REMINDER



Unlike Morningstar, Black Diamond allows users to organize accounts into any relationship or portfolio they find suitable.

Users have the flexibility to create new relationships or portfolios, and can rename existing ones as needed. Additionally, they can remove accounts from these portfolios and completely delete outdated relationships or portfolios.

Please reach out to [blackdiamond@harbourinv.com](mailto:blackdiamond@harbourinv.com) with questions!

## QUEST CE

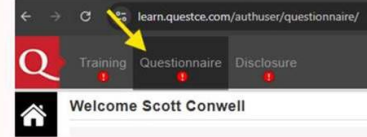
### Privacy Policy Attestation

Harbour has assigned the Privacy Policy Attestation questionnaire in Quest CE. When you log into Quest, please follow these instructions to complete the questionnaire.

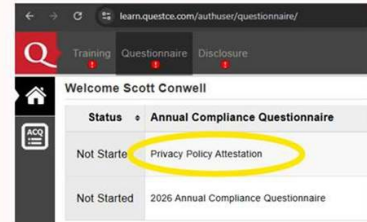
When you log into Quest, if you do not see the Privacy Policy Attestation, you do not have to complete the questionnaire.

**1** Log into Quest CE:  
<https://learn.questce.com/>

**2** Go to Questionnaire tab:



**3** You will see "Privacy Policy Attestation" with a "Begin" button on the far right side; click Begin



## Pershing® PAS and Pershing ACH Extended Cutoff Time



Effective April 20<sup>th</sup>, PAS and Pershing ad-hoc ACH requests will have a cutoff time of 3pm Central Time. Currently, the cutoff time for ACH requests is 1:30pm Central Time so this provides a more flexibility to get your client requests on the system later in the day.

Same day processing of requests will still depend on which money market the client holds and that you are putting the request on before the money fund cutoff time. For instance, if the client holds their cash in a money market that has a 1pm cutoff time, then even though the ACH cutoff is 3pm, you must get your request in before the 1pm money fund cutoff time for that ACH to go out same day.

If you miss the cutoff, you can still put the request on, but you must make sure the "Release Date" is the next day. Contact the Home Office with any questions.

Happy  
Birthday!

April 10

Emily Olson - Sun Prairie, WI

April 16

Joseph Catanzarite - South Bend, IN

Paul Knibbe - Kalamazoo, MI

Greg Volitich - Carnegie, PA

Michael Skala - Fitchburg, WI

April 18

Ian Dick - Fort Wayne, IN

Happy Anniversary!

April 14

Kim Niedfeldt - Roscoe, IL

April 16

John Bodden - Delafield, WI

David A Pagel - Cedarburg, WI

David J Pagel - Cedarburg, WI

April 17

Corby Kiss - Richland, MI

April 19

Paul Scofield - Oostburg, WI

Clayton Tyree - Elm Grove, WI

Michael Leist - Elm Grove, WI

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.

