

QUEST CE

Privacy Policy Attestation

The privacy policy mailing for 2025 and attestation in Quest needs to be completed before April 30th.

If you need a list of those who should get the mailing or want Harbour to mail for you, please contact JoAnne Hufnagel soon.


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.

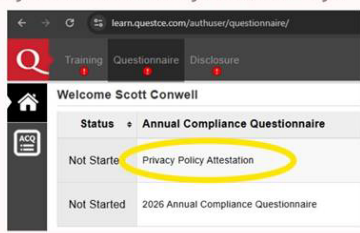
- 1

Log Into Quest CE:
<https://learn.questce.com/>
- 2

Go to **Questionnaire** tab:

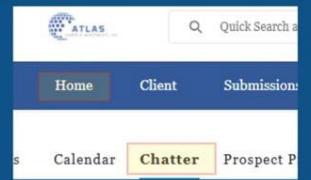

- 3

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

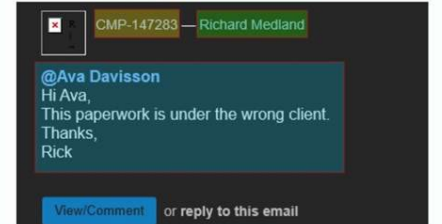


Atlas Tips: Chatter

Harbour employees, advisors, and assistants can communicate directly within Atlas. This is done via a process called Chatter! You can find a tab on your home page titled as such. This will hold a log of all current chatters associated with you:

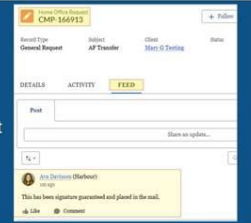


When someone at Harbour chatters you directly - it can be seen in various ways. If chattered, you will get an email with the specific submission number, who at Harbour chattered you, and the notes they left. Those chatter emails typically look like this:

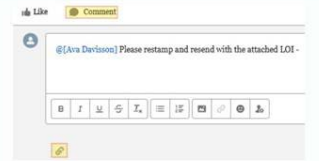


Text colors above correlate with image highlights →

Otherwise, you can search and click into the specific submission you were chattered on. Once clicked into the submission, you can click the "Feed" tab to view the comment directly within Atlas.



You can directly respond to Chatters via email, or in Atlas. If you need to attach an image to your response, be sure to respond directly in Atlas. It allows you to attach a file - if you try and respond to chatter with a file via email, the file will not make it into Atlas.



36 MONTH EMAILS & LETTERS DASHBOARD REMINDER

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 Q2 2026. **Please review these by 6/30/2026. 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 with any questions.




Review by 6/30/2026
[Click to see 36 Month Email Example](#)

2026 Q2 36 Month Emails & Letters
 Next Recommended 3...



Reach out to atlas@harbourinv.com with any questions



MONITOR PAGE

Monitor

Reconciliation Status Last Refresh: 04/22/2026 12:01 pm	Firm Status Completed	As of Date 04/21/26	Exceptions None
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Relationship Maintenance
 As of 04/22/2026 11:04 am Refresh

Relationships	Count
Accounts Without a Client Relationship	0
Accounts Without a Primary Portfolio	0

Along with last week's clean-up reminder, we wanted to highlight the **Monitor page under Client Setup**. This page shows some clean-up that you can do to see client data better, whether internally or client-facing. For example, Accounts Without Primary Portfolios, will show you any accounts that need to be housed in a primary portfolio (which also associates them with that relationship).

As new accounts come in daily, Harbour is actively assigning your team to them to gain accessibility. From there, the Monitor page shows any additional work you can do to make these reportable. Reach out to blackdiamond@harbourinv.com with any questions!

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!

April 20

Kyle Pahnke - Middleton, WI

April 22

Jakob Patch - Beloit, WI

April 23

Joshua Zoerner - Kenosha, WI

April 25

Donald Gross Jr - Waukesha, WI

Happy Anniversary!

April 20

John Augustin - Brookfield, WI

April 22

Caleb Doane - Fort Wayne, IN

April 23

Phil Larson - Bloomington, MN

April 25

David Distefano - Janesville, WI