

Office Hours Summary

August 14, 2024

Our team keeps growing!

- Welcome Sam Silberstein, CFP®, EA who will be managing our Client Service Team

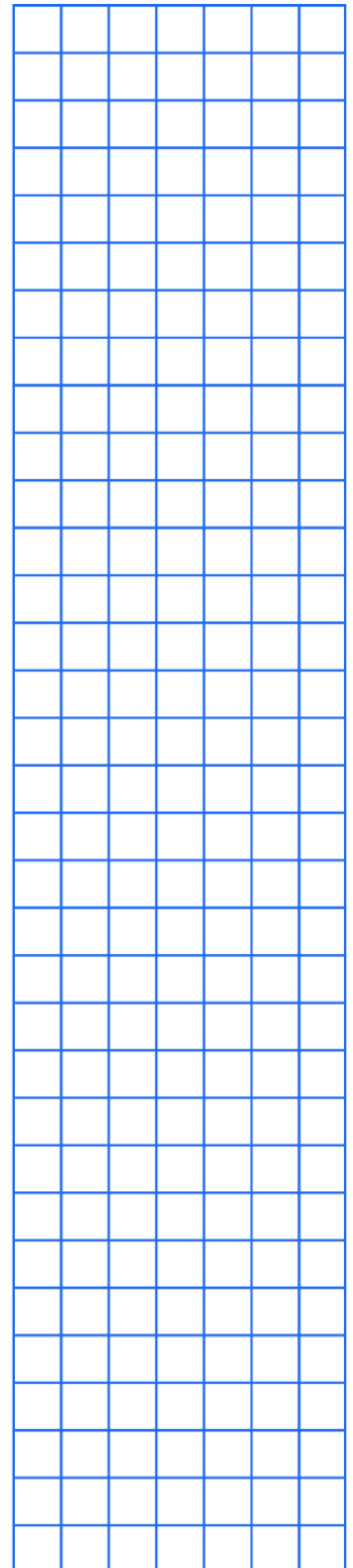
Box.com Updates

- Process improvement: You now have an assigned unique link for Box.com uploads, keeping documents associated with your firm more organized and easier for our team to locate.
- After uploading your files, please send us an email to provide the details of your request.
- This link should be used for ALL documents containing personal information. This includes full account numbers, tax IDs, identification numbers, and banking information.

A reminder about protected personal information (PPI)

Protected personal Information (PPI) doesn't belong in an email. PPI includes, but is not limited to, full account numbers, tax IDs, identification numbers, and banking information. We ask that you use box.com to relay PPI to our team. If we receive an email message that contains PPI, we may ask you to resubmit your request.

- Please note that our service request forms are **NOT** secure forms. Please mask information when using a service request form, ie: use the last four digits of an account number and in lieu of the full account number. These forms should be treated just like an email.



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Our Partnership with Northern Capital

Please join us for a special office hours session on September 17th at 9 AM MST/11 AM EST. We'll introduce Northern Capital as our bond trading partner. [REGISTER HERE!](#)

Important Dates

- September 2 - Office Closed for Labor Day
- September 9-13 - Team Retreat (Limited Availability)
- September 17 - Office Hours with Northern Capital
- October 15-17 - XYPN LIVE

Growth Award

Congrats to Brian Seymour, founder of Prosperitage Wealth. Brian had the highest net flows for July. Congrats Brian!