

Household-Level Modeling

We now offer the option to submit one model assignment for an entire client household rather than separate submissions for each account. We have also added additional asset allocation options as well. You can access the [Model Assignment & Trade Authorization here](#).

TD/Schwab Transition

Dates and Events to Note

- June 21, 2023 - Gain access to Schwab and master numbers, which will correspond to TD rep codes.
- July 18, 2023 - Review account number mapping between TD and Schwab.
- August 11, 2023 - Cutoff for TD paperwork to be submitted to XYIS.
- August 28, 2023 through September 8, 2023 - XYIS trading will be paused. We will still be able to handle cashiering requests, but we will pause rebalancing and model changes.
- September 2, 2023 through September 4, 2023 - Account transition.

Advisors can visit welcomeadvisors.schwab.com for updates and upcoming events.

Growth Award

Terry O'Grady of O'Grady Financial in Tampa, FL is the May 2023 growth award winner for net new assets. Congratulations!

Important Dates

XYPN and XYIS Closure

Monday, June 19 for Juneteenth.

XYIS Office Hours

Wednesday, July 12 at 9 a.m. MST. [Register here!](#)

Quarterly Market Review with XYIS

Tuesday, July 18 at 10 a.m. MST. [Register here!](#)

You can also view the entire [XYPN Membership Calendar](#) as well as the [XYIS knowledge base](#) for more information and past event recordings.