

# **XYIS Office Hours Summary**

July 12, 2023

# **TD/Schwab Transition**

### **Dates and Events to Note**

- 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 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 September 4, 2023: Account transition.

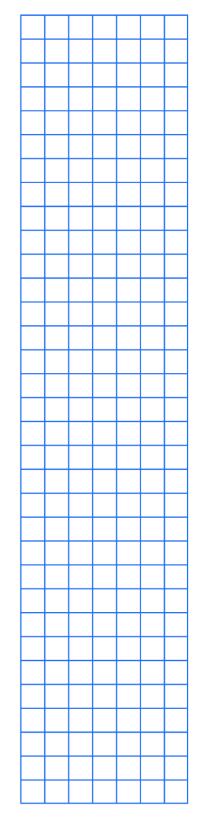
Advisors can visit <u>welcomeadvisors.schwab.com</u> for updates and upcoming events.

## Trading

We're excited to announce that we have taken over trading on the XYIS platform and all trading is now done in-house! This change made it possible for us to customize our processes and release some new features:

- Household Rebalancing
- Specialty Assets
- Heldaways
- Cash and short-term assets

You can read more about all of the benefits of these features in the <u>presentation slides</u> or reach out to the team to start using these features today!



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## **Growth Award**

Jon Butler of Opulence Planning in Helena, MT is the June 2023 growth award winner for the most AUM growth month-over-month. Congratulations!

## **Important Dates**

### **Quarterly Market Review with XYIS**

Tuesday, July 18 at 10 a.m. MST. <u>Register here</u>!

### **XYIS Office Hours**

Wednesday, August 9 at 9 a.m. MST. <u>Register here</u>!

You can also view the entire <u>XYPN Membership Calendar</u> as well as the <u>XYIS knowledge base</u> for more information and past event recordings.