



### ***Two key changes to note:***

- 1) The data entered in the account comparison tool will now appear in the proposal!
- 2) We will now have a full Investment Policy Statement included!

### **Who wants some CE?**

Introducing a new webinar series by XYIS, and yes they are CE approved! Join XYIS and some familiar faces from around the industry for these learning opportunities. More topics will be announced soon. We hope to see you there!

### **Growth Award**

Natalie Miller of Grit & Lavender Financial Planning in Brighton, MI is the July 2023 growth award winner for the largest percentage increase in AUM month-over-month. Congratulations!

### **Important Dates**

#### **CE Webinar**

Wednesday, August 23rd at 10 a.m. MST. [Register here!](#)

#### **XYIS Office Hours**

Wednesday, September 13th at 9 a.m. MST. [Register here!](#)

#### **XYPN LIVE**

Stop by and say Hi! - *Our booth on Exhibit Hall Day!*

Learn with us! - *Name Your Investment Philosophy & Better Communicate Your Value* presented by Jeff Snodgrass and Mario Nardone (Thursday, September 21st at 8:30 AM EST)

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