xypn invest

Office Hours Summary

September 13, 2023

Model Merger

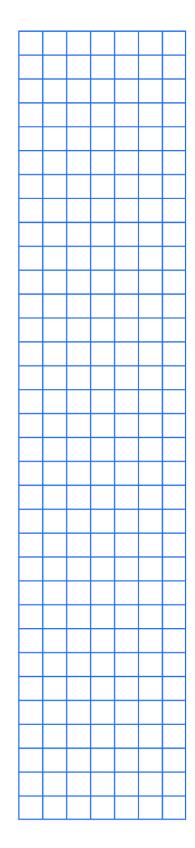
Beginning December 1st, 2023, we will merge the CORE and CORE w/ DFA models. Watch out for the new model, to be revealed in the October and November office hours.

CORE was originally mandated as a low-cost alternative to CORE w DFA, and now that all ETFs trade without commissions, it is no longer needed.

TD/Schwab Transition

Schwab <u>posted an update</u> that these are the 3 most common client requests since the completion of the merger on Labor Day:

- → Setting up web access for the first time.
 - Clients can visit SchwabAlliance.com to begin enrollment.
 - You can initiate the process from the accounts tab on Schwab Advisor Center.
- → Granting view-only access to a spouse.
 - Clients can initiate the process to grant view-only access by logging in to SchwabAlliance.com, choosing the profile icon, and selecting account access.
 - You can request paperwork from our team for the clients to sign.
 - You might also achieve this by completing powers of attorney, which provides much more than just view-only access.



WEBSITE xyinvestmentsolutions.com

PHONE 360.301.7579

ADDRESS 24 E Main St Bozeman, MT 59715

- → Changing outdated phone numbers or emails.
 - Clients can update contact info by logging in to SchwabAlliance.com, selecting profile, and then choosing contact information.
 - For a change of email only: you can edit via the profiles tab in Schwab Advisor Center.

Resource Updates

Check out our new knowledge base at

support.xyinvestmentsolutions.com. Use the "contact" button in the top right corner or the life preserver icon in the bottom right corner to send a message to our team, right from the home page!

Watch for the launch of our new Investments 101 series on Friday September 15th!

Growth Award

Erik Goodge, owner of uVest Advisory, is our winner for August. Erik had the highest % month over month growth. Congrats, Erik!

Important Dates

- → XYPN Live meetup with the XYPN Invest team. Tuesday, September 19th @ 8:30pm. Meet in the hotel lobby.
- → Medicare CE Webinar. Friday, September 29th @ 10am MST. <u>Register now</u>.
- → Tax Deadline. Thursday, October 5th, by close of business. Please submit your new account and cashiering requests early to avoid missing the October 15th tax deadline.