

- Changing outdated phone numbers or emails.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. [Register now](#).
- **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.