xypn invest

Office Hours Summary

January 10, 2024

Dividend Reinvestment Reminder

As of January 1, 2024, dividend reinvestment is no longer included on our model assignment form. Accounts with automatic dividend reinvestment will gradually have that feature disabled in the month of January. As a reminder, our daily cash management keeps balances in check. Dividend reinvestment arbitrarily reinvests dollars without concern for weighting and reinvested dividends complicate tax-loss harvesting.

2024 XYPN Invest Calendar

Our 2024 office closures are posted in the Knowledge Base - *see it here.*

Growth Award

Leland Gross, owner of Peacelink Financial Planning, is our winner for December. Leland had the highest $ net new assets, month over month. Congrats, Leland!

Important Dates

- **Office Closed: Martin Luther King Jr Day**
  January 15, 2024
- **Quarterly Market Commentary**
  Tuesday, January 16, 2024 @ 12 PM EST
  Register Here
- **Company Wide Meetings**
  January 22-26, 2024
- **IRA Contribution Deadline**
  Friday, March 29th, 2024

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