xypn invest

Office Hours Summary

October 9, 2024

Bond Trading in Beta

- ➔ Our beta testing is live for our new bond trading partnership with Northern Capital.
- ➔ Visit our knowledge base here to view the recorded webinar from September.
- ➔ Contact Jeff Snodgrass if you have any questions or would like to join the Beta testing.

2024 RMDs

- ➔ RMD reports will be sent out on or before November 1st

2024 Year-End Processing Deadline - 11/22

Please submit time-sensitive requests for Schwab by *Friday, November 22nd* to ensure ample time for processing. This includes RMDs & QCDs, new accounts, roth conversions, etc.

Important Dates

- ➔ 10/10 *Medicare 101 Webinar (CFP CE Eligible)*
- ➔ 10/15-10/17 *XYPN LIVE*
- ➔ 10/22 *Quarterly Market Review*
- ➔ 11/11 *Veterans Day (Team unavailable)*
- ➔ 11/12 *Avantis Investors Webinar (CFP CE Eligible)*

Growth Award

Congrats to Brent Hoskins, founder of Focal Point Financial Group. Brent had the highest net flows for September. Congrats!

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