# 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 <u>here</u> 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

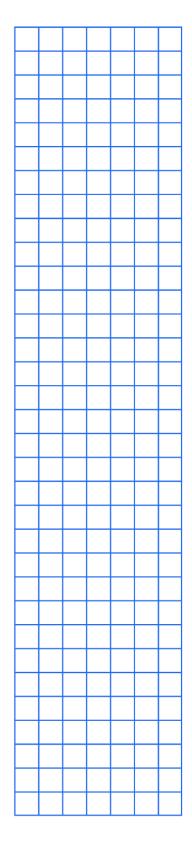
Please submit time-sensitive requests for Schwab by *Friday, November* 22nd to ensure ample time for processing. This includes RMDs & QCDs, new accounts, roth conversions, etc.

#### **Important Dates**

- → 10/10 Medicare 101 Webinar (CFP CE Eligible)
- → 10/15-10/17 XYPN LIVE
- → 10/22 <u>Quarterly Market Review</u>
- → 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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