

Office Hours Summary

November 13, 2024

2024 RMDs

→ Our team sent reports for those RMDs that are off-track.

Please reach out to the team if you have any questions about your client's RMD.

2024 Year-End Processing Deadline

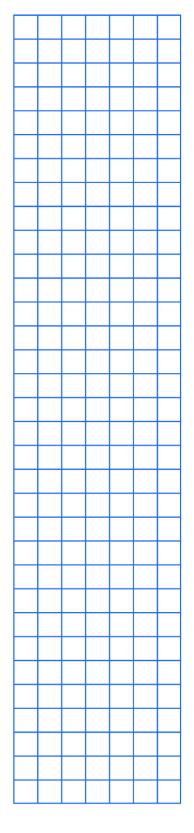
Move Money Requests (RMDs, QCDs, Roth Conversions)

- → Money Movement Requests were due to our team by November 8th, 2024. Requests received after that date will be processed by Schwab on a best-efforts basis
- → New Accounts & Account Maintenance Requests are due to our team by November 22nd.

We encourage you to review any pending items on your end and ensure that all necessary documentation is complete to avoid further delays. Please understand that while we will submit your request promptly, processing times are now beyond our control and subject to Schwab's capacity.

Important Dates

- → 11/28 & 11/29 Closed for Thanksgiving
- → 11/22 Deadline for new account requests
- → 12/3 DFA Webinar (CFP CE Eligible!) Register Here
- → 12/23 through 12/27 Closed for Winter Break



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Growth Award

Our October growth award winner is Josh Salway, founder of Full of Grace Financial. Josh had the highest Net New Assets in October, congrats!