

Office Hours Summary

December 11, 2024

This was our last office hours of 2024 - we're wishing you all the best this holiday season and can't wait to see you in 2025!

Updated Model Kit & Fact Sheets

→ Check out our updated model kit in the knowledge base!

Q4 Billing Timeline

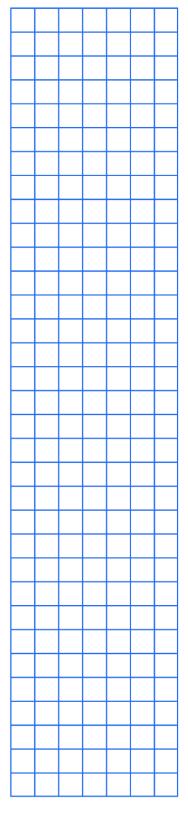
- → Review your account settings by **Thursday**, **December 19th**
- → Forecast payable summaries will be sent on Friday, December 20th.
- → We'll submit fee files to Schwab on January 3rd, 2025!

Important Dates

- → 12/23 through 12/27 Closed for Winter Break
- → January 1st, 2025 Closed for New Year's Day

Growth Award

Our October growth award winner is Kristy Runzer, founder of OnRoute Financial in Haddonfield, NJ. Kristy had the highest Net New Assets in November. Congrats, Kristy!



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