

# Office Hours Summary

*June 12, 2024*

## TD Ameritrade/VEO One Drawdown

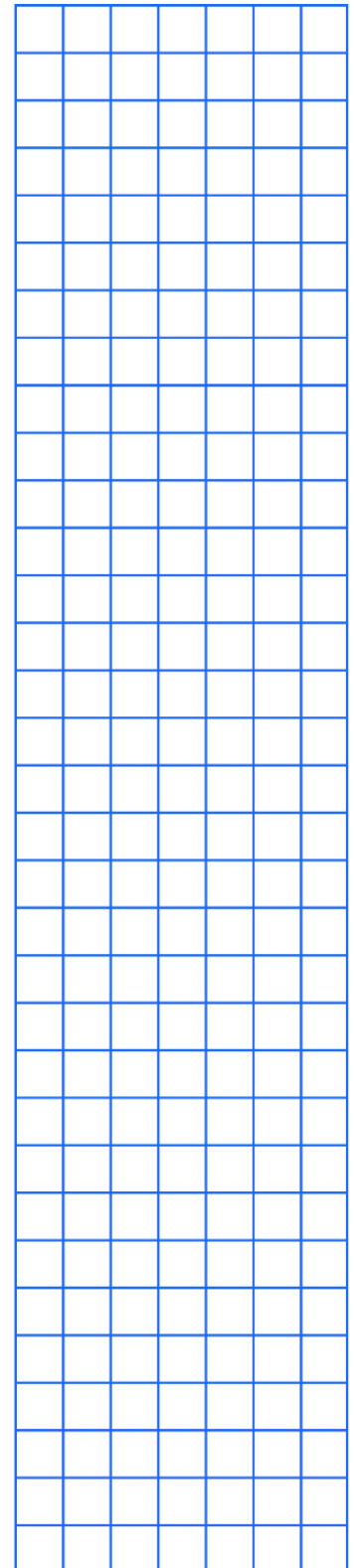
Beginning July 12, 2024, all transactions into/from TD Ameritrade Institutional accounts will be rejected. This is for any transactions that are using TD's ACH instructions (direct deposits from payroll, bill pay, etc) to move money directly to and from the brokerage account. Please remind clients that they should be using [Charles Schwab's ACH Instructions](#).

## New Phone System

Our team has a new phone system. Instead of an outsourced receptionist, we will receive calls directly to our computers via Zoom. When you call in, you will arrive at our main menu. **Press 3 for TAMP Support!** Please note that because we no longer have a live receptionist, you may be directed to voicemail when the team is unavailable. We'll call back as soon as we're able!

## Our team keeps growing!

- Joe Reidy, Onboarding Manager
- Starting in June, Trading Specialist
- Starting in June, Chief Compliance Officer
- Now hiring, Client Service Manager



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## **Important Dates**

- Juneteenth, June 19th, Office Closed
- Independence Day, July 4th, Office Closed
- Quarterly Market Review, July 16th, [Register Here](#)
- Jeff's Sabbatical, July 15th-August 9th, Bon Voyage!

## **Growth Award**

Congrats to Cynthia Meyer, owner of Real Life Planning for being this month's Growth Award recipient. Congrats Cynthia!