

# **Office Hours Summary**

July 10, 2024

# Our team keeps growing!

- → Evan Wontor, Investment Ops & Trading Specialist
- → Buddy Griffiths, Chief Compliance Officer
- → Starting in July, Client Service Manager

# **Schwab Updates**

- → Account Owner Rules for inbound ACH have changed
- → We are experiencing better processing times than before with accounts opening in as little as 24 hours!
- → Tax Withholding Elections are now editable in Advisor Center!

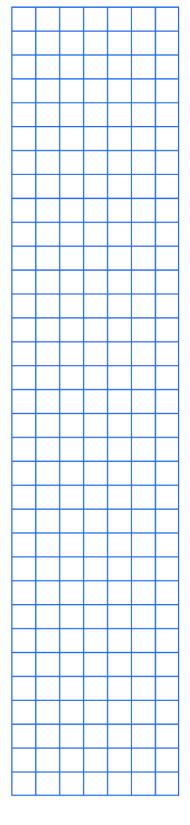
#### TD Ameritrade/VEO One Drawdown

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 <a href="Charles Schwab's ACH">Charles Schwab's ACH</a> Instructions.

<u>VEO One is going away on July 22, 2024.</u> Please plan accordingly and make time to download any historical Ameritrade data you may need at your earliest convenience. There will be no access to Veo One after this date.

# **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.



WEBSITE

xyinvestmentsolutions.com

PHONE

360.301.7579

**ADDRESS** 24 E Main St

Bozeman, MT 59715

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!

### **Important Dates**

- → Quarterly Market Review, July 16th, Register Here
- → Jeff's Sabbatical, July 15th-August 9th, Bon Voyage!

Reminder: Please use our team inbox to reach us via email! support@xyinvestmentsolutions.com

#### **Growth Award**

Congrats to Cynthia Meyer, owner of Real Life Planning for being this month's Growth Award recipient - *for the second month in a row!*Congrats Cynthia!!!