



From Your Partners at Panoramix

Have we told you how much we love and value you? No? Well, we do. A LOT. So much so, we've crafted a new email newsletter for you to better keep up with the latest updates and news from Panoramix. Rather than just giving you a long list of release notes, we thought it would be good to incorporate other news items that pertain to you. After all, we're here to help you be amazing for *your* clients, so it's the least we could do for ours!

Schwab APIs are Ready

After several releases in limited-advisory-beta mode, the Schwab APIs are ready for full engagement. Before you proceed to implement for your advisory, watch the Schwab API video available under Help >> Help Guides in Panoramix.

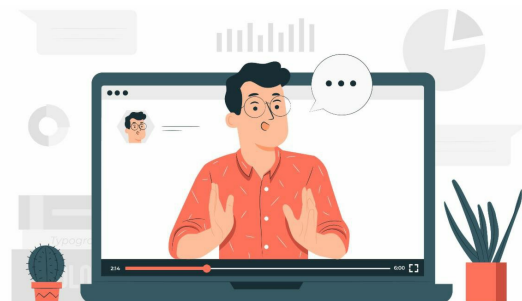
[Click here to watch the video.](#)



May Webinar Series

Our May webinar series is next week, don't miss it! The latest Deep Dive topic looks at practices and procedures regarding account ownership, establishing household relationships, trust account ownership and controls, and management for trusts. Join us May 18 at 10am or May 19 at noon Central time.

[Register for any of the sessions here.](#)



New Panoramix Release Today

Document management and client portal enhancements, a faster-running Panoramix and more! Make sure Panoramix updates for this epic release.



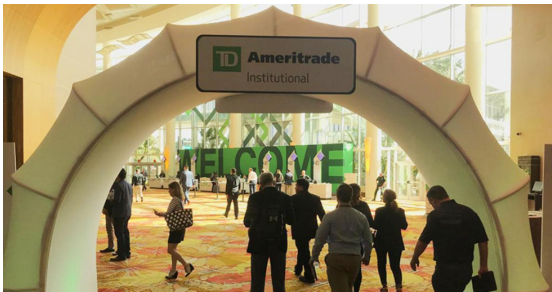
Technology Tools for Today (T3) Conference



Panoramix Registration Discount

Save 38% on your T3 Conference registration today! Enter **T3PANO2021** before choosing your registration type, and get \$100 off through us, paired with the \$200 early bird discount. You'll get some extra perks from us if we get to see you in September, so let us know you're coming! The early bird discount is good through June 1.

[Register for the 2021 T3 Conference here.](#)



We're Ready for In-Person Events

"Humans are social beings, and ultimately, we are going to return to our human nature and gather in groups again. We need to do that safely and responsibly. Virtual conferences have got us through a very trying time, and have kept us safe, but we all need the human touch."

[Keep reading here.](#)

Get social with us!

