

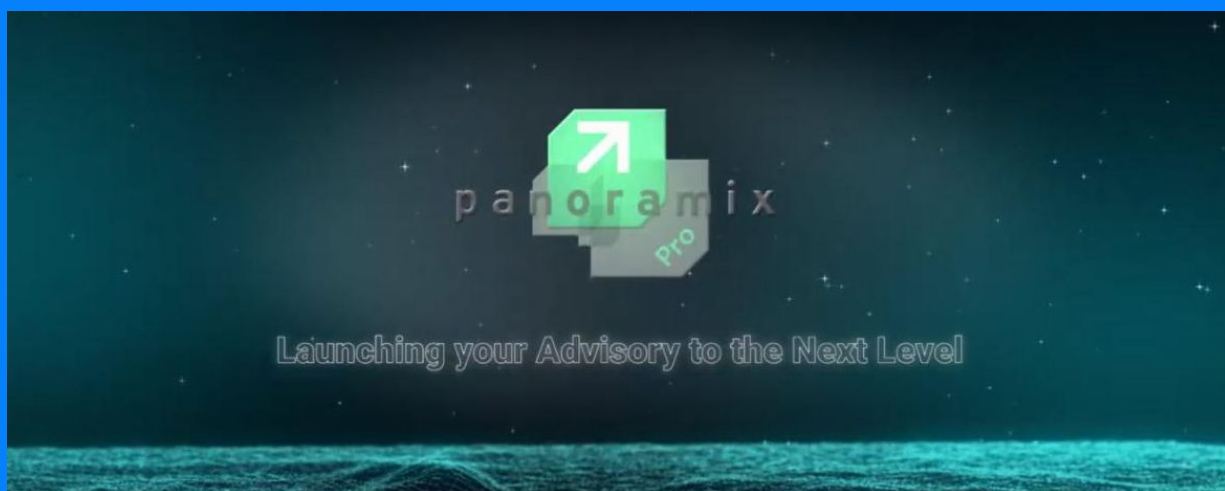


From Your Partners at Panoramix

This is a BIG newsletter! We have some big and important news items, so make sure read on.

Introducing Panoramix Pro

click the image to discover...



New Panoramix Release Today

Today may not be a typical release day, but we do have the typical notes available for reading. Next to Panoramix Pro, we do have some corrections in this update. We are now on version 2.1.0.0!

[Read all the performance enhancements here.](#)



Important Compliance Change: PTO 2020-02

If you: 1) Have tiered fee schedules; 2) Check the *Calculate Blended Rate* parameter in the Panoramix Fee Settings; and 3) Have household portfolios comprised of both benefit plan and non-retirement accounts determining the tier, then this is for you. You

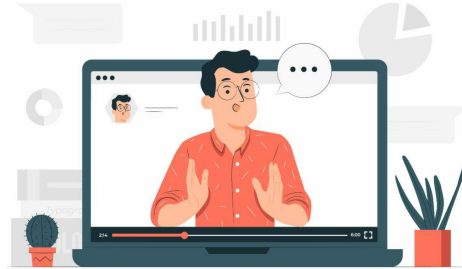
must comply with the Department of Labor PTE 2020-02 rules clarifying compliance with Section 406 of ERISA and IRC Section 4975. Panoramix is making changes to help you comply, and you need to take specific actions to ensure compliance too. We will have more information available as we get closer to our compliance implementation date. For now, know that we are working on that deliverable and that you will need to plan some time to ensure that your accounts are properly tagged in Panoramix and that you have your billing Fee Settings established correctly after the effective date.



November Webinar Series

Our November webinar series is approaching, mark your calendar! We'll be going over features included in Panoramix Pro. Join us on November 16 at 10am or 2pm, or November 17 at noon, all times Central.

[Register for our webinars here.](#)



Panoramix Support Phone Line

Have you ever called Panoramix Support? If you have, you're probably used to Joe Lucking picking up. But no more! From here on, when you dial 877-595-3282, option 3, our Customer Success Lead, Adeena Wade, will answer.

Adeena joined the Support team back in January, and has greatly enjoyed working with our clients. She will be happy to answer your call! Just note, sometimes her furry friend Asher likes to speak up, too. Adeena can be reached directly at 360-702-7718, or awade@PanoramixFinancial.com. She is on West Coast hours.



Tips & Tricks for Panoramix

ADEENA'S TIPS & TRICKS



Did You Know?

Do you have any accounts that can't be delivered to Panoramix via a custodian feed? Or maybe you don't want to get ByAllAccounts for one account? Never fear, you can enter it manually!

There's a couple of ways to enter accounts manually--you can track individual holdings, or you can specify an account value. However, you cannot do both.

The process might seem daunting, but we're here to help you! Chris went over the entire process in our February 2020 webinar. Find it on our Help Guides site, under Webinars, located at the 15:46 mark.

If you ever want assistance, feel free to schedule a video meeting with [Support](#) anytime. Email, call or text, we're here for you!

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