



From Your Partners at Panoramix

This newsletter is loaded! We have a release today, an important compliance notice, an upcoming webinar all about Panoramix Pro and more. Read carefully!

Now that we've officially entered holiday season, please take note of our first holiday break. Panoramix staff will be offline Thursday, November 25th through Friday, November 26th in observance of Thanksgiving.

New Panoramix Release Today

Version 2.1.0.2 is out today! We have some key fixes and enhancements in this update, so make sure to get this release downloaded for Panoramix to perform at its optimal level.

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



Important Compliance Change: PTO 2020-02

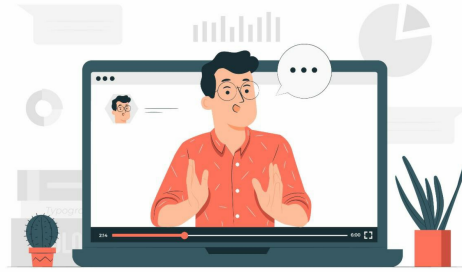
If you: 1) Have tiered fee schedules; 2) Check the *Calculate Blended Rate* parameter in the Panoramix Fee Settings; and 3) Have household portfolios comprised of both benefit plan and non-retirement accounts determining the tier, then this is for you. You must comply with the Department of Labor PTE 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 happening next week! We'll be going over the new features of Panoramix Pro. Join us on November 16 at 10am or 2pm, or November 17 at noon, all times Central.

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



T3 2022 - Get this BOGO Deal!

The T3 conference is back on! The event has been rescheduled to the first week of May, 2022. A BOGO is happening right now for advisors, so don't miss out on this epic registration deal. See you in Texas in May!

[Register and get the T3 BOGO deal here.](#)



Panoramix Pro is in the News!



Panoramix Pro made it to the November edition of "The Latest in Financial #AdvisorTech!" Click the logo to see what Michael Kitces has to say.



WealthManagement.com also caught wind of Panoramix Pro, publishing a write up shortly after our release! Click the logo to read it.

Tips & Tricks for Panoramix



Did You Know?

The Blotters are valuable tools for any advisor seeking information within their book of business. With so many applicable filters, it's easy to get lost in the data!

Because filter settings can be hard to narrow down again once they're lost, we have it so any settings you've applied to a blotter are saved between sessions. So, when you need to clear those settings, remember to click "Reset Entire Grid" at the bottom of the screen.

Would you like us to walk you through all of the Blotters and their features, or help you track down some specific information? Reach out and feel free to schedule a video meeting with [Support](#) anytime. Email, call or text, we're here for you!

Get social with us!



Any recommendations for our newsletter and outreach? [Tell us what you want to see!](#)