



From Your Partners at Panoramix

Happy November, all! We have several important notes in this newsletter, so please read carefully.

New Panoramix Release Today

Version 2.1.0.27 is ready for download! We have several enhancements today, some of which may require you to update your settings.

[Read all the enhancements here.](#)



Partner Spotlight

[AllBackoffice Consulting](#) has been helping RIA firms since 2009. You can trust them with a range of administrative workflow support services such as client onboarding, IT support, software implementation and management, compliance administration and marketing administration.



Advisors utilize AllBackoffice as a gap filling resource for operations, administrative jobs or other tasks you or your team may not have the time or expertise for. Some utilize services when a staffer has left, or when the team is overwhelmed due to growth.

AllBackoffice account managers adhere to a fiduciary engagement model, with an intentional effort to avoid bias or conflict of interest in regard to IT or other advisor vendors and solutions.

"Our focus with each advisory typically includes providing outcomes such as increased growth, peace of mind and focus for the advisors and their in-house staff."

--Julien Mordecai, Founder

Panoramix Support Holiday

Panoramix staff will be offline for the following two days later this month, observing the Thanksgiving holiday:

- Thursday, Nov. 24
- Friday, Nov. 25

If you expect to need assistance from Support over this four-day weekend, you can schedule time with support staff beforehand via the calendar links below in the Tips & Tricks section.



Panoramix Pro Access Ending

Panoramix Pro's exclusive free access period for current Panoramix users ends on January 15, 2023. If you would like to continue to use Panoramix Pro please reach out to Sales@PanoramixFinancial.com and we can get you signed up.



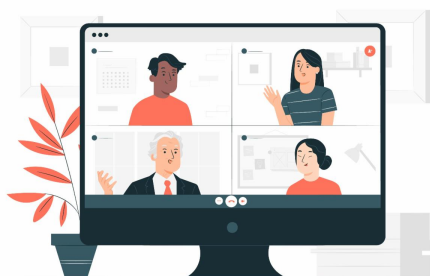
[Learn more about Panoramix Pro here.](#)

Taxpayer IDs and birth dates no longer included in Schwab download

Moving forward, advisors will need to request the date of birth and Social Security number/Taxpayer ID of clients to be included for each master account. This is applicable to incoming clients, as well as accounts transferring from TD Ameritrade. This information is available in your data files, but you must make the request to Schwab Advisor Platform Support for them to be downloaded to Panoramix.



[More information is available here.](#)



Support Forum

Tuesday, Dec. 13 at 1 p.m. Central

This is an excellent hour to ask any support questions, or discuss the financial services and fintech industries with Chris, Joe, Adeena, James and Jim.

[Register for the monthly forum here.](#)

Coming Soon: Panoramix YOUiversity

Tuesday, Nov. 15 at 1 p.m. Central

This quarter we're revisiting our November 2020 topic of Billing in Your Client's Best Interest with an interesting update, as well as presenting performance reporting in Panoramix in light of the new SEC marketing rule. We'll also cover those new features with some demonstrations.

Click the link below to sign up to receive an email notification for when the webinar is ready for viewing.

[Register to receive the webinar recording here.](#)

Tips & Tricks for Panoramix

Did You Know?

Obtaining the download link for Panoramix is something you can do on the web in two places!

Panoramix Web Version:

You can log into the web version of Panoramix at www.panoramixweb.com and find the download link for the desktop software under the "Help" page.

Panoramix website:

Visit www.panoramixfinancial.com, and click the "Admin" link in the main menu. In this portal, enter your Panoramix login information. From this page, you can download Panoramix and change your password.

ADEENA'S TIPS & TRICKS



If you ever have questions, reach out anytime, we're here to help you! Panoramix is stocked full of tools to may your day-to-day workflow smooth and efficient.

- Email the Support team at Support@PanoramixFinancial.com.
- Call Adeena on the Support phone line at 877-595-3282, or call/text her cell directly at 360-702-7718. She comes online every day at 8am Pacific/10am Central.
- [Schedule a meeting with Adeena here.](#)
- [Schedule a meeting with Joe here.](#)
- [Schedule a meeting with multiple Support staff here.](#)

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