



## From Your Partners at Panoramix

Happy December, all! Today we have a couple of notices for you and some tips on how Panoramix can help you send holiday greetings to your clients. Let the year-end work begin!

### New Panoramix Release Today

Version 2.1.0.28 is ready for download! We have a short and sweet list of corrections improvements for you today.

[Read all the enhancements here.](#)



### Partner Spotlight

If you've [seen us in the news](#) recently, you know we've strengthened our partnership with [TradePMR!](#)

For more than two decades, TradePMR has worked with growth-minded independent RIAs providing innovative technology tools and support designed to transform their businesses. The privately-held brokerage and custodian services provider (Member FINRA/SIPC), based in Gainesville, Fla., works to streamline fee-only investment advisors' operations through comprehensive custodial, operational, and trading support.



### 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](mailto:Sales@PanoramixFinancial.com) and we can get you signed up.

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



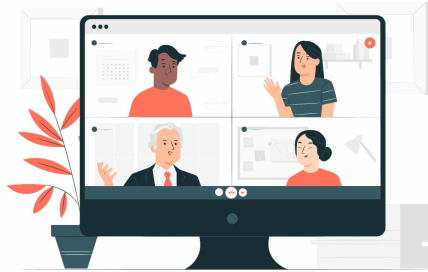
The 2023 T3 Annual Advisor Survey is open! We would *greatly* appreciate if you could complete this survey. It is a valuable tool to the advisor profession and financial services industry as a whole. **We are listed in Portfolio Management as Panoramix Pro.**



Per Bob Veres of Inside Information:

"We're hoping you'll take a few minutes to tell us what you're using and what you think of the elements of your tech stack; just click on a button in the categories that you're using and skip the rest."

[Access and take the survey 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.](#)



## November Panoramix YOUiversity

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 also cover those new features with some demonstrations.

[View the latest session of YOUiversity here.](#)

# Tips & Tricks for Panoramix

## Did You Know?

Looking to send holiday greetings to your clients? Panoramix can help you do so in three different ways!

1. **Send custom PDF through Batch Reports.** Create your own digital holiday card or letter, save it as a PDF, and import the file to be sent through Batch Reports. You can opt to include any Panoramix financial reports, or not. This is a bulk send to any or all clients of your specification.
2. **Create a Microsoft Word Mail Merge.** Create your Word document and upload it to your private Vault in Panoramix. Then, you can use it to create a custom report to send to your clients.
3. **Generate a client email list.** Under Contacts, there is a small blue menu with six buttons. Click "Print Labels" followed by "Generate Email List." This gives you a full list of every client email you have in Panoramix that you can copy and paste into the BCC line of an email you wish to send to everyone.

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](mailto: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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