



From Your Partners at Panoramix

Happy New Year! We hope the calendar flip was a smooth one for you and your firm. With today's release notes, we have a handful of important notices listed for you below. Please read carefully to avoid future workflow disruption.

New Panoramix Release Today

New Account Month End Values blotter! Updated Schedule 13F! Generate notes from Mail Merge! A new column in the Billing Payouts grid, and oh so much more! We've got quite the list for you today.

Get a hold of these shiny new features now, version 2.1.0.31 is ready for download.

[Read all the enhancements here.](#)



Partner Spotlight: axos

Today we're shining the spotlight on axos, a new-to-us technology partner. After recent acquisitions, we're excited to see them growing stronger in the RIA space.

We love an intuitive custodian passionate about helping advisors grow to their fullest potential. Stay tuned for what Panoramix and axos create together to strengthen your firm!

[Learn more about axos here.](#)



Panoramix Pro Access Has Ended

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

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



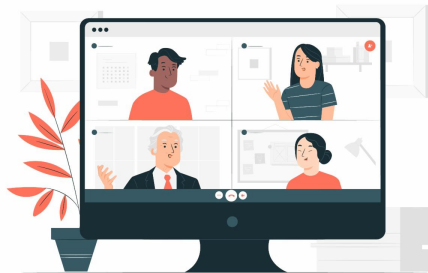
Taxpayer IDs and birthdates no longer included in Schwab download (and is necessary for RMDs!)

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.



TIP: If you track RMD information for clients in Panoramix, you will need this date of birth download.

[More information is available here.](#)



Support Forum

Tuesday, February 14, 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.](#)

2023 T3/Inside Information Survey Open

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 or Panoramix Pro.**



[Access and take the survey here.](#)

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."



T3 Conference Registration Discount

Have any plans March 13-16? You should! The 2023 T3 Conference is taking over the JW Marriott Tampa Water Street hotel in Tampa, Florida. We've already got our table arranged on the conference floor.

Join us, here's \$200 off your registration!

Enter discount code **Sapphire200** before selecting a registration type.

Tips & Tricks for Panoramix

Did You Know?

Via the Portfolio Dashboard of any client, deleting an account is as easy as right click > Delete.

However, we cannot stress enough, the actions of

deleting an account from Panoramix is as **permanent** as can be.

Once an account is deleted, you lose ALL history and data from the account. It isn't affected at the custodial level, but it **is removed completely from Panoramix**.

So, the next time you're thinking of deleting an account, make sure you are **ABSOLUTELY** sure you won't need anything else from it in Panoramix, ever again. Once you complete the process of deleting, it's 100% final!

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 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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