February 9, 2023 | Volume 29

From Your Partners at Panoramix

And just like that, it's already February. We have a lot of reading for you this week, but we promise, it's all useful information. If you make note of anything today, let it be to download the latest version of Panoramix for some great new enhancements!

New Panoramix Release Today

This release makes several additions to Panoramix that will enhance your workflow, including a new Income report that shows actual income YTD and a forecast for the remainder of the year!

Read about our several other enhancements in version 2.1.0.32 below.

[Read all the enhancements here.]

Partner Spotlight: Zacks Investment Research

Today we’re introducing you to Zacks Investment Research, the second largest provider of stock, mutual fund and ETF research in the US!

If your firm manages model portfolios or customizes them for clients, Zacks could be of great benefit to your workflow. Included in your subscription to Zacks are advisor tools including a portfolio proposal writer that can stress test hypothetical portfolios, diversification reports, historical performance comparisons, as well as hundreds of benchmarks, indexes and more.

Start by visiting advisortools.zacks.com, the ZAT site, to sign up for a free trial to Zacks Research. This will unlock tens of millions of investment data items for your firm. Then, you can get to work on applying Zacks vast array of research offerings to your book. If you’d like to schedule a free demo, contact Evangeline at 312-265-9485, or by email at eking@zacks.com.

To learn more, visit www.zacks.com.

Bear Markets Ravage AUM Based Fees

In this article published in the 2023 Wealth Management Market Outlook, Panoramix CEO Chris Hastings and Director of Operations Joe Lucking share their thoughts about the market effects of the previous year on AUM billing.

[Read the 2023 Market Outlook here.]

Upcoming TDA Conversion

TD Ameritrade

We're seeing an increase of inquiries regarding the upcoming merge of TDA into Schwab. Here is what we can tell you so far:

- We have been, and will continue doing the work to make the transition as easy as possible for you. We are on track, and will be 100% ready when the big day comes.
- Although our goal is to have the Panoramix portion of this conversion seamless to you, you*will* have some other work to complete on the custodial end. These items will need to be completed closer to the conversion date. We'll do the research to understand these steps to help you complete them.
- As we become aware of actions you can take in preparation, or become aware of any pertinent information, we will share such with you.

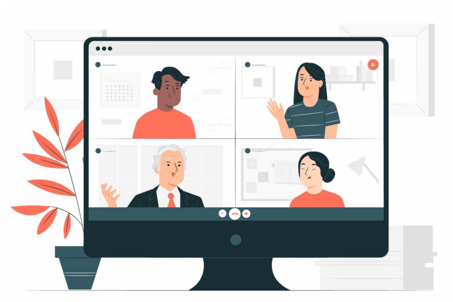
If you have any specific questions regarding the transition for your firm, feel free to join the Support Forum next week (see below) or email us at Support@PanoramixFinancial.com.

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.
In this PDF if you click "let us know" in the bottom right-hand corner of page 8, your email client will open with a template to request this download.



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.

Panoramix YOUniversity

Tuesday, February 21, at 1 p.m. Central

Learn about payout schedules and our integration with AdvicePay in this session of Panoramix YOUniversity.

Register for the webinar 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 assignment on the conference floor, look for us at booth #312!

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

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

Tips & Tricks for Panoramix

Did You Know?

Getting ready to do some spring cleaning in Panoramix? Good timing, as Clean Your Computer Day is next week! Just in time, we've created a quicker way to **merge contacts in Panoramix**.

If you find yourself seeing duplicate client contacts in Panoramix, find the one you want to keep, and enter the dashboard. In the Contact Information tile, click the hamburger menu in the upper left-hand corner, and click "Merge."

The other place to merge contacts is under the Contacts page in Panoramix.

If you've ever wondered why duplicate contacts appear, it's usually because we get custodial files that indicate those two people are different via differing taxpayer IDs. Most of the time duplicates are quickly resolved by merging them, but if you continue to see the same duplicates after, let us know and we can investigate why.

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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