



From Your Partners at Panoramix

We'd like to say that spring has sprung, but we're not sure if "spring" is the ample descriptor for the 84 degree weather in Minnesota, sandwiched between 30 degree days, or even the fresh snow Adeena got yesterday over in Vancouver, Washington. Either way, tax day is almost here, meaning some of you get to catch a well-deserved break soon!

New Panoramix Release Today

Version 2.1.0.35 is out!

We have a big one for you today, with loads of added capabilities and fixes. Get all the juicy details in the link below!

[Read all the enhancements here.](#)



User Poll on Asset Map

[Have you heard of Asset Map, the financial mapping tool for advisors?](#)

Asset Map enables firms to produce visual reports that graphically organize household finances. Their features include goal tracking with target reports and data mining, making for a useful set of tools to enhance your workflow.

If you have a few spare minutes, we'd love to know if you'd be interested in learning more about Asset Map, so we can gauge whether or not an integration with them would be beneficial to you.

asset+map

Would you be interested in learning more or possibly seeing an Asset Map/Panoramix integration?

I use Asset Map and would be interested in an integration.

I would like to learn more about Asset Map.

I'm not interested in adding functionality at this time.

Upcoming TDA Conversion

Preparation for the big conversion date continues. We have kept up on the work to make the transition as easy as possible for you, and are on track to be ready when the 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.

As previously mentioned, Schwab *will* include the date of birth and taxpayer IDs in masters transferring from TD to Schwab. They *will not* include this data in new Schwab masters. To download those dates and IDs to Panoramix, you will need to make a request to Schwab Advisor Platform Support.

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



Ameritrade

Notice: Panoramix Price Change in Effect

Effective with renewals starting January 1, 2024 (and new customers as of April 1, 2023) Panoramix and Panoramix Pro costs have increased. The new pricing is available on our website at <https://panoramixfinancial.com/Account/RatePlan>.

We've done our best to simplify our pricing, keep our costs the very lowest in the industry, and continue to provide a superior product and support. It's been four years since our last price change and in that time the fees we pay to access and process data as well as other costs have escalated. This price increase will enable us to maintain the high level of quality and service that we have always provided.

If you need assistance determining your 2024 renewal date, please contact Support@PanoramixFinancial.com.



Last Chance! Contribute to Kitces Research on Advisor Technology Use

Kitces Research launched a new study to help understand the advisor use and satisfaction with various technology tools. The results of this survey will help advisors make more informed decisions about their tech stack. If you have some time to spare, your participation will be appreciated and valued!

[Take the survey here.](#)



Register for the next Panoramix Webinar

Our May webinar is right around the corner! Sign up below to receive an email notice once the recording is available.

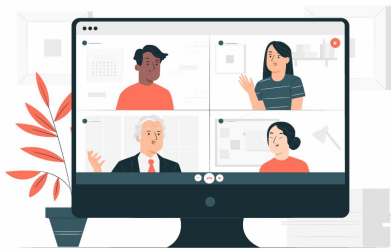
If you haven't tuned into our webinars before, you can consider them a short lesson in using key Panoramix features to enhance your workflow. Not only do we provide a "deep dive" lesson, but we review new features in Panoramix. To see library of webinars, visit the Help Guides under the Help tab in Panoramix, or check out [this playlist on YouTube](#).

[Sign up for our webinar notices here.](#)



Support Forum

Tuesday, May 9, 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.](#)

Tips & Tricks for Panoramix

Did You Know?

Did you notice a change in the arrangement of your billing settings after the last release? We moved a few lesser-used settings to an "Other Settings" button.

So, if you're generating fees and ever find yourself looking for:

- Use PTE 2020-02 Rules
- Ignore Leap Year
- Calendar Year Leap Year

you'll find them when you click "Other Settings" in the billing parameters. They haven't disappeared, they're just an additional click away.

If you ever have questions, reach out anytime, we're here to help you! Panoramix is stocked full of tools to make 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 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.](#)

ADEENA'S
TIPS &
TRICKS



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