



From Your Partners at Panoramix

No introduction, this letter needs. May the fourth be with you.

New Panoramix Release Today

Version 2.1.0.37 is out!

No Jedi mind tricks here, just upgrades to make our software even more astral! Read all the details below.

[Read all the enhancements here.](#)



Twelve years ago today, in a galaxy far, far away... (nah, just Minnesota)

A little software called Panoramix added its first external username!

We are so thankful to each of you for joining us on this journey. We are here today, thriving, thanks to your support.

We dedicate our birthday cheers to you!

Upcoming TDA Conversion

We will be covering this topic in our next webinar. Scroll to the end to sign up to receive the link to view the webinar recording when it's ready.

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



Ameritrade

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.

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.

Register for the next Panoramix Webinar

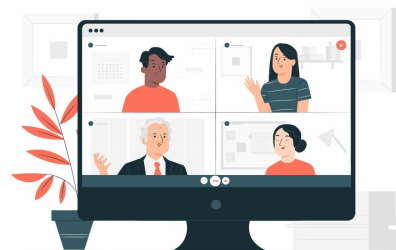


Our May webinar is right around the corner! Sign up below to receive an email notice once the recording is available.

This month we will be reviewing several major enhancements, as well as discussing what to expect for the upcoming TD/Schwab conversion, scheduled to take place over Labor Day weekend.

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

To see past webinars, visit the Help Guides under the Help tab in Panoramix, or check them out [on YouTube](#).



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?

You can now create blended Asset Classes and Asset Types based on existing classes and types!

Go to Settings > Static Data > Asset Classes/Types > Blended

A friendly reminder: whenever you make changes to Static Data, its best practice to restart Panoramix for those changes to be applied to the rest of the system.

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 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.](#)

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