



From Your Partners at Panoramix

The holiday weekend is almost here! Please take note of the holiday notice below. We've got a loaded release for you today, as well as a fantastic webinar that covers the upcoming TDA/Schwab conversion among a few other topics. Happy reading!

New Panoramix Release Today

Version 2.1.0.38 is out!

Today we're releasing a lot of exciting new enhancements! Take some time to read the list of them below, explore them in Panoramix, and reach out if you have any questions!

[Read all the enhancements here.](#)



One of the new features we added enables you to add information to any error you submit:

A screenshot of an 'Error Message' dialog box. The title bar says 'Error Message'. The main text says: 'Panoramix encountered an unexpected error. Please enter any additional information, that might help us investigate the issue, and click on "Report This Error" button.' Below this is a text input field with the placeholder text 'Error message appears here...'. To the right of the input field is a red circle with a white 'X'. Below the input field is a button labeled 'View Complete Error Details'. Below that is a section titled 'Additional Information' with a text area containing the text: 'Please type in as much additional information as you can about the actions that lead up to this error here. Include specifics about client, account, etc. as available to you. Then click Report this Error.' At the bottom left is a button labeled 'Report This Error' and at the bottom right is a button labeled 'Close'.

Partners

Are you thinking about taking a bold step towards independence as a Registered Investment Advisor but don't want to leave your book of annuity assets behind? DPL

Financial Partner's Breakaway Accelerator Program is here to help. This program is specifically designed to assist you in retaining control of your annuity assets and your clients' experience as you make the transition away from your former broker-dealer.



How it Works:

1. DPL Consultant analyzes your clients' current annuities and identifies opportunities for improvement through an exchange to a fee-based annuity, if suitable.
2. For accounts not eligible for an exchange, DPL Financial Partners is named the Agent of Record so you can retain control of the client experience.
3. As the advisor, you are paid an advisory fee for ongoing management and investment advisory services.
4. As policies come out of surrender, your DPL Consultant helps you transfer these assets to a suitable advisory annuity to help improve the portfolio and financial plan.

So, whether you're just starting to consider independence or you're ready to make the leap, DPL's Breakaway Accelerator Program is a valuable resource that can help ease your transition.

Contact a DPL Consultant at 888.327.0049 or orcontact@dplfp.com to get started.



Memorial Day Holiday - Support Closures

Panoramix Support staff will be offline Monday, May 29, in observance of the Memorial Day holiday. Coverage will also be limited on Friday, May 26, ahead of the holiday weekend.

Please direct **all** Support inquiries to Support@PanoramixFinancial.com to ensure coverage, or submit a request under the Help tab in Panoramix.

Upcoming TDA Conversion

This topic is covered in our May webinar. The recording is linked below.

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.

Now Available: Panoramix YOUiversity

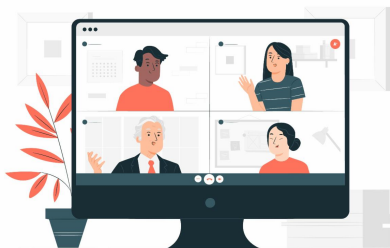


Our May webinar is here! In this session we cover:

- The upcoming TDA/Schwab conversion
- Select new features in Panoramix
- Fixed income investments and performance reporting
- Advice around integrating your email client with Panoramix

Watch the webinar now: <https://youtu.be/4Omp3msKLCc>

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



Support Forum

Tuesday, June 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.](#)

Tips & Tricks for Panoramix

Did You Know?

TDA users, who will soon become Schwab users:

With today's release, we have added the ability to search by Previous Account Number!

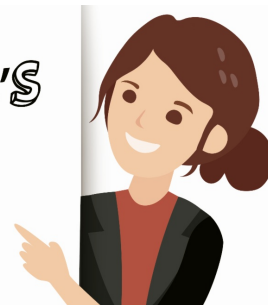
For all transitioning accounts, this means you can search for the TDA account number, even if it's now a Schwab account.

This feature can be found under the Data tab, via Find Account.

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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