July 13, 2023 | Volume 36

From Your Partners at Panoramix

TD Ameritrade folks, we have an important update for you in this newsletter, so be sure to read below. Otherwise, we have a great release for you today, and a short and sweet newsletter!

Update to Panoramix Released

Version 2.1.0.43 is out! Get that download started, there's some exciting features in there!

In addition to adding Billing Templates, today we're introducing changes to the Client Portal, with the ability to have multiple usernames. You can manage this by accessing the Client Portal tab of the Contact Information screen.

Read all the enhancements here.

Partner Spotlight - Pontera

Pontera formerly FeeX

We're excited to introduce you to Pontera, the technology platform that helps retirement savers attain 401(k) management from their trusted financial advisor. Pontera integrates with Panoramix to help advisors incorporate clients' retirement account performance into holistic views of their entire financial life.

Today, the median American family holds the majority of their assets in retirement funds, so it's no wonder over 60% of investors want more help with these accounts. Utilizing Pontera capabilities within Panoramix, advisors can plan, review, and bill on employer-sponsored accounts.

By incorporating retirement planning into comprehensive wealth management, advisors can scale their practice and ultimately help clients achieve a better retirement. To learn more, visit pontera.com/integrations.

TDA CONVERSION UPDATE:
Prepare for Account Number Changes

Panoramix has been ahead of the curve in preparing for the upcoming TD Ameritrade conversion to Schwab. Come Labor Day weekend, all we'll have to do is change the custodian name!

NOTICE: We are changing TD account numbers in Panoramix to Schwab account numbers. It will give you, the advisor, the most seamless experience. Account numbers will be changed on Tuesday, July 25th. You do not need to do anything for this.

All reports will still show the TD account number until the official switch Labor Day weekend. However, you will see the new Schwab account number on the Portfolio Dashboard.

We are trying to do as much as possible prior to Sept. 6th, so we can minimize risk. We have the account mapping from Schwab, which will enable us to make these account changes on 7/25. This will provide us with a full month end (plus a little extra time) to adjust if necessary.

There's more information on this conversion process in ourMay webinar.

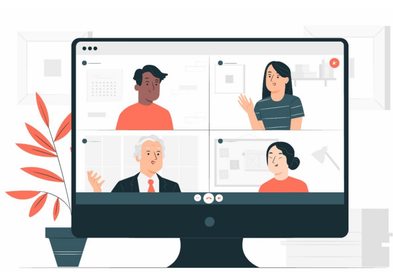
If you have any specific questions regarding the transition for your firm, feel free to join our next Support Forum (see below) or email us at Support@PanoramixFinancial.com.

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.



Support Forum

Tuesday, August 8, 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, Sean, Adeena, James and Jim.

Register for the monthly forum here.

Tips & Tricks for Panoramix

Did You Know?

You have the ability to create three kinds of user-defined fields! You may recognize the ability to add Account and Contact fields, but in March, we added Holdings to the list, too.

Under the Settings tab, navigate to Static Data. User Defined Fields will be at the bottom of the list on the left. This is where you create the fields you want to be able to use in categorizing or making notes for contacts, accounts and holdings. Click the green Save button when you're done editing, and then restart Panoramix to apply the new fields to every contact in Panoramix.

Below is where you can fill in the fields you just created. Make sure to click the green Save button each time you edit them!

Contact: In the Contact Information tile, click Edit. In the new window that opens, navigate to the Custom Fields tab.
Account: Access the Portfolio Dashboard and double-click on any account. In the window that opens, access the Custom Fields tab.
Holding: Access the Portfolio Dashboard and double-click on any holding. In the window that opens, the Custom Fields you've created will be listed in the bottom left-hand corner.

If you ever have questions, 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.

Get social with us!

Any recommendations for our newsletter and outreach? Tell us what you want to see!