



From Your Partners at Panoramix

The clock is ticking! All eyes are on Schwab with the upcoming TDA conversion. Panoramix users are set and ready to roll! If you have any questions regarding what's coming, we've linked information below.

Update to Panoramix Released

Version 2.1.0.47 is out! We have some notable additions and corrections today, detailed in our enhancement list:

[Read all the enhancements here.](#)

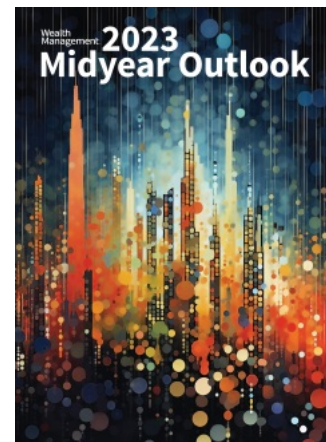


Out Now: WealthManagement.com Midyear Outlook

Director of Operations Joe Lucking takes to the stage to speak on organic growth in advisory firms.

"This analysis relies on 25 years of historical data involving nearly 200 advisory firms who grew entirely organically--no mergers or acquisitions--with an overall AUM growth trajectory in the last ten years, and which crossed a set boundary between small, medium, large or extra-large at least once. The results serve as an energy bar for the advisor who is in the business for the long haul and who is willing to wrest their way up L'Alpe d'Huez."

[Keep reading in the Midyear Outlook here.](#)



Notice to Windows 10 Users

Applications such as Panoramix and Schwab Advisor Center may prompt for installation when opened following a Microsoft Windows 10 system update released earlier this month. In addition, your stored username and password may be blank. We regret the inconvenience of this condition. It is beyond our control.



The details are here: <https://learn.microsoft.com/en-us/windows/release-health/status-windows-10-22h2#apps-deployed-via-clickonce-might-prompt-for-installation-when-opened>

There are two solutions to this in the short term. At this time, we do not recommend the Known Issue Rollback procedure mentioned in the KB article above as there is the potential for other unknown and unintended consequences of that action.

Solution one: Upgrade to Windows 11.

Solution two: Launch the Windows Task Scheduler tool and locate the Microsoft Windows App Compatibility Appraiser background task service in the list. If it is running, right click it and select End. Right click on it (again) and select Disable. Then reinstall Panoramix. <https://answers.microsoft.com/en-us/windows/forum/all/permanently-disabling-windows-compatibility/6bf71583-81b0-4a74-ae2e-8fd73305aad1>

Once Microsoft fixes the underlying problem, you may reenable the task.

As a reminder, Microsoft's Windows 10 end of life support is October 14, 2025. Mainstream support ended with the release of version 22H2 on October 18, 2022.

TDA CONVERSION - 9 Days Away!

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!



Ameritrade

NOTICE: We have changed TD account numbers in Panoramix to Schwab account numbers.

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

There's more information on this conversion process in our [May 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.

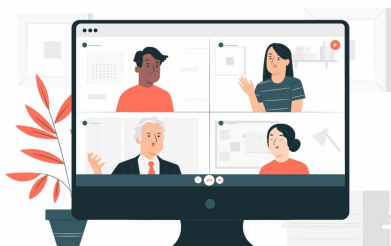
Notice: Panoramix Price Change in Effect

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, September 12, 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.](#)

August Webinar - Billing Settings A to Z

Our August webinar is here!



Panoramix YOUiversity sessions are short lessons in using key Panoramix features. In this session, we cover billing settings, from A to Z!

[Watch the webinar here.](#)

Tips & Tricks for Panoramix

Did You Know?

You can access additional widgets in your dashboards without adding them to your dashboard configuration!

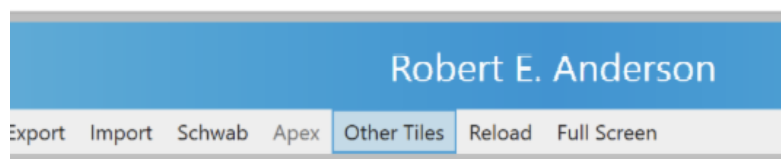
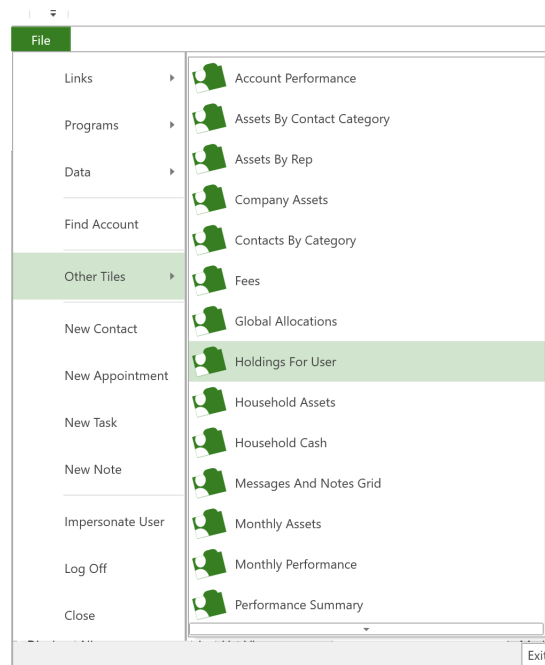
Knowing how to access these tiles allows you to reduce the number of widgets in your dashboard, which can speed up load times. Save those time consuming tiles for when you really need them!

ADEENA'S TIPS & TRICKS



In your Advisor Dashboard (the one you see when you open Panoramix), click "File" in the upper left-hand corner, and look for "Other Tiles." Click the widget you'd like to view, and it will open in a new window.

In the Client Dashboard, look for the "Other Tiles" button in the grey menu bar beneath the client name. Clicking this button will present a list of additional widgets you can view. Simply select one and it will open in a new window.



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.](#)

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