



From Your Partners at Panoramix

We will be exhibiting at the Schwab Impact conference in Philadelphia in 2 weeks (October 24-26th)! If you are attending, please stop by and say hi to Jim and Chris, they would love to see you!

Update to Panoramix Released

Version 2.1.0.49 is out! We have some notable additions and corrections today, detailed in our enhancement list.

In this release we have enhanced our new Fixed Income Report based on initial feedback. In this crazy world of inflation and inverted yield curves, it is a great complement to our performance reports and can help you better education your clients on bonds, T-Bills, and other fixed income investments.

[Read all the enhancements here.](#)



New Kitces Research Report: The Technology That Independent Financial Advisors Actually Use and Like (2023)



An exciting new Kitces report is now available for your readership! Thank you for rating us so highly in the survey. Panoramix has been named the highest value Performance Reporting tool, with the second-highest satisfaction rating in the category!

[Read the Kitces study here.](#)

TD To Schwab Update

We are still getting transactions from TD Ameritrade every day. These residual transactions are mostly corporate actions such as dividends, splits, and reorganizations. The cash effects of these transactions are reflected at Schwab the following day (in most cases). Please take note that this will continue



potentially until early December. We are doing our best to get those transactions incorporated and reconciled for you, but if you see anything questionable, please let us know at: Support@PanoramixFinancial.com.

2024 T3 Survey Open Now!

It's that time of year again, the annual T3/Inside Information WealthTech survey is now live!

If you have 15-20 minutes to spare, we would love for you to contribute to this valuable industry survey. Advisors like you rely on the T3 Survey to make informed FinTech decisions for their advisory firm and to benefit clients.



Panoramix is aiming for a sixth year consecutive win for top user satisfaction in Portfolio Management!

[Access the 2024 T3 Survey here.](#)

Schwab Reminder

Data Attestations: Every advisor working with Schwab has to re-confirm (attest to) their Panoramix data file feeds once per year on Schwab Advisor Center. Failing to do so will result in Panoramix feeds getting turned off. There is a rotating cycle of when advisors are due for their attestations, so these can potentially occur every month of the year. It's not anniversary-date driven. You will receive notice from Schwab when your attestation period opens up. Don't put it off.



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 in August. 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.

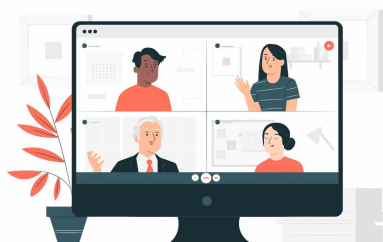
Notice: Panoramix Price Change in Effect

Effective with renewals starting January 1, 2024 (and new customers as of April 1, 2023) Panoramix and Panoramix Pro costs increase. 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.



Join Our Support Forum

Tuesday, November 14, at 1 p.m. Central

Thanks to those who joined our October forum. Our next one is November, so you'll see two notices about it in our newsletter.

This is an excellent hour to ask any questions related to Panoramix, or discuss the financial services and fintech industries with Chris, Joe, Sean, James and Jim.

[Register for the monthly forum here.](#)

Helpful Hints for Panoramix

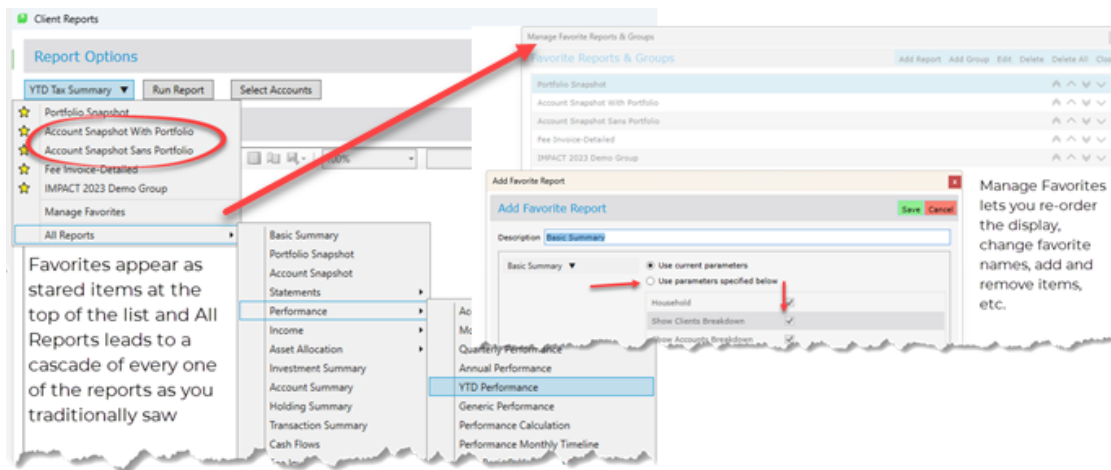
Did You Know?

Face it. Panoramix ships with over 50 reports and you regularly use what? Five? Six? Sure the others are great to have from time to time, but scrolling through that list every - single - time is tiring. Favorites to the rescue!

Add any report to your Favorites list by right-clicking on it in the report list and selecting Add to Favorites from the context menu. Or, use the button on the bottom of the report viewer to add the currently active report to the list. You may create favorites using specified pre-configured parameters or the parameters currently displayed. You can even create multiple favorites for the same report with different parameters for each favorite. Simply give the favorite a different name. Also works for report groups.

**PANORAMIX
TIPS &
TRICKS**





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. Several functions to assist you are available under the Help tab in Panoramix.

Email Support

Visit Help Guides

View Webinars

- Email the Support team at Support@PanoramixFinancial.com.
- Call the Support phone line at **877-595-3282**. Panoramix staff come online at 8am Central.
- [Schedule a meeting with Joe here.](#)
- [Schedule a meeting with James here.](#)
- [Schedule a meeting with multiple Support staff here.](#)

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