



## From Your Partners at Panoramix

It was wonderful to see so many of you at Schwab IMPACT® 2023. We had an excellent conference week and hope you did too.

This is one jam-packed newsletter. We appreciate every single minute you give us in reviewing it and the links provided. Thank you for your time and continued business partnership.

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### Update to Panoramix Released

Today we press Deploy on version 2.1.0.51, our pre-anti-penultimate release of 2023. Over a dozen test builds went into creating this release and it is chock full of changes. Among the more important ones are a revamp of the RMD engine, including the ability to take advantage of the available (optional) life-expectancy table values reset for non-spousal inherited IRAs via a new account parameter; a new distributions report that easily combines taxes withheld, and distributions made so that you don't need to get that from Veo and SAC and manually do the math yourself; and a new advisor-level activity auditing report called Trade Summary. While this started as a means of tracking equity trades by employees, and that is still its primary purpose, it can fill other needs as well.



It's an impressive enhancement list.

[Read all the enhancements here.](#)

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## Panoramix Support **Holiday Schedule**



It's November now, making it time to plan for the upcoming holidays. Please note the following about Panoramix Support availability.

- November 23 **AND** November 24 - Closed for Thanksgiving
- December 22 - Closed after Noon central time
- December 25 - Closed
- December 29 - Closed after Noon central time
- January 1 - Closed

The final two releases of 2023 are presently set for the evenings of November 21 (yes, a Tuesday, not a Thursday) and December 14.

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## TD To Schwab Update

TDA residual transactions continue every day and will for another 30-or-so days. These 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](mailto:Support@PanoramixFinancial.com).



# Ameritrade

## 2024 T3 Survey Still Open

It's that time of year again, the annual T3/Inside Information WealthTech survey is live for another few weeks. To those of you who've already filled out the survey, our deepest thanks. If this remains on your to do list, plan 15 - 20 minutes. We are aiming to both increase our survey market share and retain our highest satisfaction ranking (for the sixth year running). [Access the 2024 T3 Survey here.](#)



## FINAL 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.



\* Unless this becomes necessary again, which we hope it does not.

## FINAL Notice to Windows 10 Users

This past August Microsoft released a patch that makes Windows forget things like your stored username and password and other settings for applications like Panoramix. 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 - which is feeling less and less likely - you may re-enable the task.

As a reminder, *Microsoft's Windows 10 end of extended 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

The time is getting closer. If you've been glossing over this section since March, it may be time to give this a closer read. While all new customers have been on the new rate structure since April 1, renewals starting January 1, 2024 will just begin to see the change. 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 and other costs have escalated. This price structure enables us the ability 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](mailto:Support@PanoramixFinancial.com).



### Join Our Support Forum

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

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.](#)

### November YOUNiversity session

Look for our next session release on the afternoon of November 21, which also happens to be our next planned release day, so busy day for us. Register for the webinar [here](#). (If you've registered for any of these at any time in the past there is no need to register again. You're still on the list.)



## Helpful Hints for Panoramix

### Did You Know?

Blotters go tabular.

Not all blotters, of course, but you can start to see the impact of tabular blotter structures with the Performance blotter. The first tab is an Account-level performance blotter and the second tab breaks performance by Holdings within your Display group.

In the future we may consolidate some of the other 18 blotters into similar tabs to make better use of screen real estate.

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.

PANORAMIX  
TIPS &  
TRICKS



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Visit Help  
Guides

View Webinars

- Email the Support team at [Support@PanoramixFinancial.com](mailto: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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