

June 20, 2024

NEWS & UPDATES



Panoramix 3.0 went live last month, and we thought you might want to know a little more about what that means.

We've made some significant changes behind the scenes. Running on .Net CORE brings benefits like **improved performance**, **enhanced security**, **scalability**, **improved support for micro-services**, **reduced costs**, **faster updates**, and **streamlined development**.

Optimized for performance, applications built on .Net Core run faster and more efficiently, which will increase the responsiveness of Panoramix.

There are also robust security features that are essential for financial applications dealing with sensitive client data, and its forward compatibility makes it easier to develop and maintain Panoramix.

All of these benefits contribute to an even better product in terms of speed, efficiency, cost-effectiveness, and user-satisfaction. Give it a try! [Install Panoramix 3.0 now!](#)

And check out all Release Notes [Here](#).

Panoramix named a 2024 Wealth Management Awards Finalist in

three categories!

Three this year! Thrice is nice. Panoramix is honored to earn three Finalist slots in 2024 Wealth Management Industry Awards! Check out the list [here](#). Look in Compliance, Retirement Planning and Workflow Automation.

Nominated for:

- Technology Providers: Business Support Systems Workflow Automation
- Technology Providers: Compliance
- Technology Providers: Retirement Income Technology

Q&A Live! Get the Inside Scoop: Panoramix Support Open Forum

Free Panoramix Q&A! Learn from the experts and get your questions answered directly. Join our Support Open Forum via Microsoft Teams.

When: Tuesday, July 9th, at 1:00 p.m. Central

**Reserve Your Spot
Now!**

(If you've registered in the past there is no need to register again.)

And remember that you may access all prior webinar recordings at any time in the Help Guides [Here](#).

Avoid Mid-Month Discrepancies in Performance Reports

Ever noticed differences between your Generic Performance and Statement Reports, when comparing the last day of a month to the first day of the next? Here's why:



For these reports, using the last day of the month as the starting date relies on pre-calculated snapshots Panoramix has on hand. However, using any other date forces the system to rebuild your account state from scratch based on daily data provided by your custodian.

The catch? Not all custodians, like ByAllAccounts (or any other held-away source), deliver daily data perfectly. This can lead to discrepancies in your reports.

The Takeaway:

- Stick to "as of today" reports when you need the latest picture.

- For specific periods (months, quarters, years), don't use generic reports and choose the dedicated reports designed for those timeframes.
- Be cautious of mid-month performance reports with data from less reliable custodians.

By following these tips, you can ensure your reports accurately reflect your financial performance! More information available in the [Panoramix FAQ](#) pdf, pg. 18.

Financial Advisor Spotlight:

Calling all rockstar financial advisors! Are you making waves in the industry with innovative ideas or client wins? Do you have fresh insights to share with the community? This is your chance to step into the spotlight!

We're searching for advisors who are redefining financial planning and inspiring others. Send us a quick blurb about what you've been up to lately. It could be anything from a new approach to retirement planning to a client success story!

We can't wait to showcase your brilliance! Let's get your name out there and help you share your passion for financial wellness.

Share Your Story With Us!

YOUiversity Webinar is here!

Panoramix is on a roll! We're taking you on a whirlwind tour of our journey, showcasing the innovations that keep us ahead of the curve.

Get a sneak peek at some features of **Panoramix 3.0**, designed to revolutionize the way you manage your finances. But that's not all!

We'll also take a deep dive into the power of the **Portfolio Snapshot Report**, your ultimate tool for optimizing performance and maximizing insights. Don't miss out on this chance to see what the future holds. Check it out [here!](#)

Ready to unlock the future of Panoramix with us? Subscribe to the [Panoramix YouTube](#) channel and click the notification bell to be alerted when new webinar links are live. See you there!

Plan Ahead: Our Summer Holiday Schedule

Heads up! We'll be closed on these summer holidays:

- Independence Day, July 4th
- Labor Day, September 2nd

Enjoy the sunshine and make sure you check back for more updates!

Need Help? We're Here for You!

Panoramix is always here to help! Packed with handy tools under the Help tab, it can streamline your workflow and make those to-do lists a breeze. And remember, we understand that questions may arise throughout the month. Here's how to reach our friendly customer support team when you need us most:

**Email Support
Now**

- Email the Support team at Support@PanoramixFinancial.com.
- Call the Support phone line at 877-595-3282 available starting at 8 AM CST.
- [Schedule a meeting with Joe](#)
- [Schedule a meeting with James](#)
- [Schedule a meeting with multiple Support staff](#)

Need a quick refresher?

Click the buttons below to explore even more resources – Panoramix is your one-stop shop for getting things done efficiently!

**Visit Help
Guides**

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