

Yes, this would save me time and improve my tax planning process.

No, I prefer to not estimate year end capital gains within mutual funds.

Maybe, I need more information about how this feature would work.

Considering a New Custodian?

Are you looking for an additional custodian or interested in seeing what's available? Join us on August 1st to hear how Betterment's cutting-edge technology can help you scale your practice and deliver a high-quality, personalized client experience. We have a new integration with Betterment and we will be demonstrating their platform in this joint webinar!



When: Thursday, August 1st, at 1:00 PM Central

Reserve Your Spot
Now!

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, August 13th, 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](#).

Improving Dividend Accuracy for You!

We're always striving to provide the most reliable information for your investment decisions.

Currently, we get estimated annual



income for equities, ETFs, and mutual funds from custodians. TD had the most comprehensive data, but they are no longer available and as a result our estimates were stale and not always reflect a trailing 12-month period.

The good news? We're actively testing a new service that promises more consistent and accurate dividend data. This means you can expect a clearer picture of your potential income streams. We'll update this information with the new process within the next week!

— 10TH ANNUAL — 2024 Wealth Management.com Industry Awards

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

Plan Ahead: Our Summer Holiday Schedule

Heads up! We'll be closed one more holiday this summer:

- 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**

View Webinars

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Please share your feedback by selecting one of the responses below.
Tell us what you liked and how we can make Panoramix better.

Is the content of this email relevant to you?

Yes

No

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