



February 6th, 2025

NEWS & UPDATES



Panoramix Playbook: February 2025 Edition

Big Wins, Smart Plays, and Game-Changing Updates!

The Super Bowl isn't the only place where strategy and performance matter—at Panoramix, we're always running the best plays to keep your billing and reporting game strong! With the latest **Panoramix 3.0.28.0**, we're rolling out new updates and bug fixes to help you stay ahead of the competition and keep your workflows running smoothly.

Ready to huddle up and dive into what's new? Let's kick things off!

Enhancements – Keeping Your Playbook Strong

- **Portfolio Snapshot (Enhanced):** Option to hide "Top 10 Holdings" section or display notes marked as "Display on Other Reports."
- **Holding Summary Report:** Added a secondary grouping parameter to the landscape version.
- **Trade Summary Report:** Now displays a trade's timestamp.
- **Transactions Blotter:** Added the Trade Timestamp column.
- **RMD Blotter:** Account Description and Account Registration Type columns now display without selecting "Include Account Info."
- **Form ADV Reporting:** Updated client state count when counted by

household.

- **Blotters (Fees, Performance, Realized Gains):** Group display grid is now resizable.
- **Panoramix API:** Now allows viewing and manually setting risk scores on contacts and accounts not connected to Nitrogen.

Bug Fixes – Clearing the Field

- **Asset Change Summary Report:** Fixed issue preventing all accounts from displaying.
- **Single-Time Frame Reports:** Resolved issue where two group filters displayed different Basic Rate of Return.
- **Portfolio Analytics Report:** Fixed issue where the three-month period was missing.

We hope these updates keep you moving down the field with smoother, more efficient workflows. Your feedback calls the plays that drive our success—so keep it coming!

Click [here](#) to see the full Release Notes.

Partner Spotlight: Dunham Trust Company



DUNHAM
TRUST COMPANY

If your money is idling why not put it to use through Dunham Trust Company and DTC Cash? You can start earning 3.59% APY in DTC Cash with one stop access up to \$50 million in FDIC Insurance.

DTC Cash offers up to \$50 million in FDIC Insurance by allocating deposits across a network of FDIC insured banks. This cash management account provides stability, daily liquidity, and convenience. DTC Cash delivers what we at DTC believe is a competitive yield and increased insurance protection.

Dunham Trust Company (DTC) is an advisor-friendly, client-focused trust company with a history of providing exceptional service. Our team focuses on building a relationship to understand your plan for the future.

Message from Panoramix: We now integrate with DTC Cash, offering a new module that can be added to the client portal. Please note that this interface is optional and off by default. It requires the advisor to switch it on for it to be visible to clients.

Call the Play – Rank Panoramix in the 2025 T3/Inside Information Software Survey!

The game is on, and now's your chance to be part of the ultimate financial tech **MVP lineup!** Just like a winning football team, the best software stacks are built with strategy, innovation, and strong plays—and we need **your** voice to help shape the future of financial technology.

The **2025 T3/Inside Information Software Survey** is your chance to **review the platforms that keep your firm in championship form—including Panoramix!** Your feedback fuels our drive to keep delivering top-tier performance, and we'd love to see Panoramix make it to the end zone of rankings.

Why take the survey?

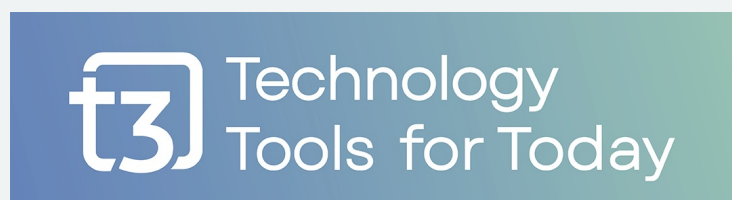
- ✓ **Rate your financial tech lineup** – See how your software choices stack up.
- ✓ **Help shape the future** – Your input is the game plan for the next wave of fintech innovation.
- ✓ **Support the industry** – A strong showing helps improve the tools you rely on every day.

Every great team needs its fans—help us bring home the trophy by casting your vote!

[Click here to take the 2025 T3 survey today!](#)

Your insights help us stay at the top of our game and continue delivering the best for financial advisors like you.

Huddle Up with Panoramix at T3 in Dallas!



The biggest game in financial technology is happening in Dallas, TX, and Panoramix is ready to take the field! T3 is the ultimate playbook for financial advisors and fintech innovators, bringing together top minds to tackle industry challenges, drive innovation, and score big on new opportunities.

Join us as we run the best plays for tech adoption, explore game-changing solutions, and strategize for a winning future in financial advice. Don't sit on the sidelines—T3 is your chance to connect with industry leaders, gain valuable

insights, and sharpen your game plan for success.

Lock In Your T3 Game Plan – Exclusive Savings for Panoramix Users!

Exclusive Discount for Financial Advisors

Discounted Rate: \$999

Regular Rate: \$1099

Use code **Sapphire200** at registration and **save \$200** on your Financial Advisor pass!

Register Now and Secure Your Spot!

Panoramix Q&A Blitz – Get Your Game Plan Ready!

Get in the Game with Our Open Support Forum!

Every great team needs a solid **game plan**, and we're here to help you **call the right plays**! Join our free monthly **Panoramix Q&A session**, where you can **connect with the experts, tackle your toughest questions, and pick up winning strategies** to maximize your software experience.

Whether you're fine-tuning your playbook or exploring new features, this **live, interactive session** is your chance to get ahead of the competition and optimize your workflow with confidence.

When: Tuesday, March 11th, at 1:00 p.m. Central

Where: Microsoft Teams

**Reserve Your Spot
Now!**

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

Review the Game Tape Anytime! Great teams study past plays to sharpen their strategy—and so can you! You can revisit all our prior webinar recordings anytime in the [Help Guides Here](#) to replay key insights, master new features, and fine-tune your Panoramix game plan.

Bring your questions, get in the zone, and join us for a session designed to help you win!

Fun & Games – A Little Extra for You!

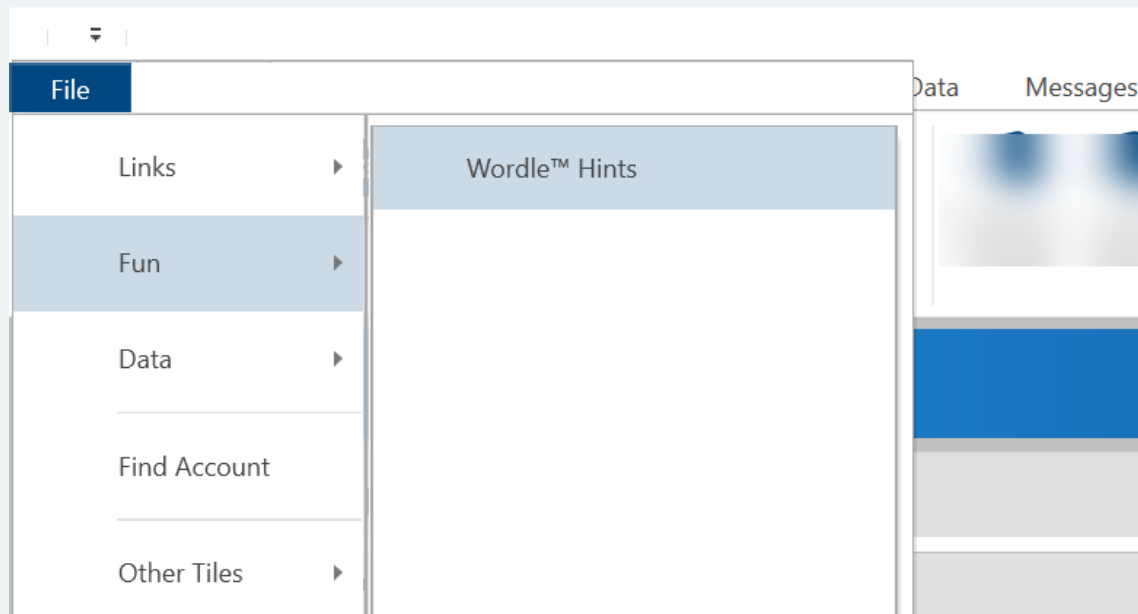
We know financial reporting requires **precision and strategy**, but sometimes, it's good to take a break and **exercise a different kind of brainpower**! That's why

we're introducing a new section packed with **fun extras**—because who doesn't love a little distraction between plays?

Wordle™ Hints – Your Secret Weapon for Daily Wordle™ Wins!

Love Wordle™ but sometimes get stuck on the final guess? We've got your back! Hidden in the Panoramix **File Menu** under **Fun**, you'll find **Wordle™ Hints**, a nifty little add-on to help you **crack the daily puzzle** with strategic hints. Whether you're a casual player or a streak-keeper, this tool will help you **stay in the game** without giving everything away.

Find it in: **File Menu → Fun → Wordle™ Hints**



Give it a try and **keep your winning streak alive!** Stay tuned for more **random, fun finds** in future newsletters!

Pro Move: Run Your Schedule 13F Report with Ease!

Want to stay ahead of the game with SEC reporting? Panoramix makes it easy to generate your Schedule 13F report in just a few clicks! Whether you're prepping for compliance or just keeping your playbook in order, this report ensures you have the data you need at your fingertips. Run it today and stay in control of your reporting game!



Where to Find It:

Panoramix > Reports tab > SEC Reporting > Schedule 13F

Select your parameters and run the report

Export to Excel for easy analysis

Panoramix For Financial Advisor Andrea Flores Ortiz - Displaying data for Panoramix Support CRM (PanoramixSupport)

File Home Utilities Settings **Reports** Billing Data Messages Help

Advisor Reports Batch Reports Executive Summary SEC Reporting Form Letters Form Notes Lehi, Brian Lucero, Ambur Addams, Gomez Zuhilke, Sherri Diamond-Garcia, Stacy (Last Viewed)

Displaying data for Panoramix Support CRM (PanoramixSupport)

SEC Reporting

Schedule 13F Form ADV Form N-PX

Run Report Export to Excel Export to XML Data current for Q4 2024

End Date
Last EOM ☒
Year 2025
Month 2

Select Report Parameters

Filters
Include Empty Identifiers ☐
Include Inactive Clients ☒
Include not required items ☐

Display Options
Include data for users All

Schedule 13F
Holdings as of 01/31/2025

Issuer	Identifier	Symbol	Value	Quantity
AMAZON COM INC	023135106	AMZN	\$329,424.4800	1,386.0000
APPLE INC	037833100	AAPL	\$5,455,848.0000	23,118.0000
CATERPILLAR INC	149123101	CAT	\$371,440.0000	1,000.0000
DELTA AIR LINES INC DEL	247361702	DAI	\$1,076,320.0000	16,000.0000
INVESCO QQQ TR	46090E103	QQQ	\$522,290.0000	1,000.0000
MICROSOFT CORP	594918104	MSFT	\$9,451,690.8500	22,771.8664
Total for holdings			\$17,207,013.3300	

Include empty identifiers: No
Include inactive clients: Yes
Include not required items: No

Panoramix Report run on 2/6/2025 2:47:10 PM

Page 1 of 1

Have questions? Contact our friendly support team at support@panoramixfinancial.com.

Stay in the Game – Follow Panoramix on LinkedIn!



Don't miss a play! **Follow Panoramix on LinkedIn** to stay updated on the latest product updates, industry insights, and expert strategies to keep your firm ahead of the competition.

What's in it for you?

- **Product & service updates** – Stay informed on our latest features.
- **Expert insights** – Gain valuable strategies from industry leaders.
- **Inside Panoramix** – Get a closer look at our culture and values.

[Follow Panoramix on LinkedIn Today!](#)

Missed our last newsletter? Here's what you missed:

- **Household-Level Performance:** The Account Performance Tile now displays data at the household level for a more complete client view.
- **Single Account View:** Easily analyze individual account performance within the YTD report for deeper portfolio insights.
- **Manual Risk Scores:** Manually add risk scores to contacts and accounts for more customized assessments.
- **Mobile Compatibility:** Fixed display issues on mobile devices for a smoother Panoramix web app experience.

Read more: [January 16th, 2025 Newsletter](#)

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

Get Social With Us!



Got 15 seconds?

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

Give More
Feedback

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