March 20th, 2025

NEWS & UPDATES

SEVEN

9.42. Doubled market share! Seventh consecutive year of top marks in the Portfolio Management category and fourth successive year with a ranking above 9.0. Simply unprecedented.

We sincerely thank everyone who participated in completing the annual T3 survey. We could not have done it without you!

See our Press Release, images, and fun video here. May we add "Licensed to thrill?"

Panoramix Version 3.0.30.0 – Smarter, Faster, and More Powerful!

We're back with another round of updates designed to make Panoramix even more powerful and user-friendly! This release brings a new bar chart to the Income Summary client report and Portfolio Value to the Month Account Values Client Portal tile for clearer insights. We've optimized Advisor reports to run asynchronously, added sorting options to the Fixed Income Summary report, and improved workflow with a confirmation dialog when closing

Panoramix and an option to exclude inactive clients from the RMD blotter!

And that's not all! We've also fixed bugs and made key improvements to keep everything running smoothly:

Additional Updates & Fixes:

- Corrected holding IRR and TWR calculations for options and short sales.
- Fixed an issue that prevented the Performance Summary advisor report from displaying in specific situations.
- Fixed an issue where duplicating a Report Group containing a PDF or Word document caused an error.
- Corrected an issue where the Top 10 holdings in the Portfolio Snapshot client report always displayed current holding value.
- Remediated issues preventing applying correct filters to data displayed in the Portfolio Analytics, Clients with Symbol, and Client Assets advisor reports.
- Updated the DST import of newly added holdings.
- Updated the Schwab import to handle new transaction types.

To get the latest updates, be sure to close all Panoramix windows and restart the application. Enjoy the new improvements!

Click here to see the full Release Notes.

Share Your Experience: 2025 Kitces Research Survey on Advisor Technology Use

Technology is shaping the future of financial advising—how are you using it in your practice? **The 2025 Kitces Research Survey on Advisor Technology Use** is gathering insights from advisors like you to better understand trends, challenges, and opportunities in the ever-evolving fintech landscape.

By participating, you'll help influence industry research while gaining early access to key findings that can inform your technology decisions. Your input matters, take the survey now! 2025 Kitces Research Survey

Partner Spotlight

Meet YourCyberLife—a cybersecurity education and resource platform designed specifically for the end clients of financial advisors. Our mission is to empower clients to recognize and proactively respond to potential cybersecurity threats, enhancing awareness and promoting best practices.

Our platform offers a range of features designed to enhance cybersecurity education and client engagement. With **Advisor Branding**, your RIA can seamlessly customize the platform with your firm brand. **Cybersecurity Educational Videos**, featuring AI voice narration and quick summaries, simplify complex topics for easy understanding. **Compliance & Content Control** provide access to detailed transcripts while ensuring firms maintain oversight of shared content. Additionally, the platform includes essential **Client-Facing Materials**, such as best practices documentation, a fraud response guide outlining steps to take if fraud occurs, a cybersecurity visual guide for quick reference, and an annual cybersecurity review checklist to support ongoing protection. Finally, we provide tailored email templates to help advisors engage their clients on this critical topic.

The platform is built for seamless integration into a RIA's website, ensuring broad accessibility, particularly during cyber incidents. Designed to be highly shareable, it allows clients to extend cybersecurity education to their family and friends.

To further drive engagement and inorganic growth, we've incorporated a "Refer a Friend" feature that allows clients to easily refer new business and leads to you. By equipping clients with the right knowledge, YourCyberLife strives to mitigate cyber risks for both your clients and your RIA.

Interested in learning more? Please contact Danny Schwartze at Danny@YourCyber.Life or visit our website at YourCyber.Life.

We Need Your Help!

So far, we've received fewer than half the number of responses required to create a meaningful baseline. **We need your help to get there by April 1**! If you didn't complete this based on the first request, please do so now.

To better understand advisory usage patterns, we've created a quick, two question survey that will help us define a baseline. We would like to have *every* active Panoramix user complete this survey based on their own usage. The first question is simply how many hours per week do you actively use Panoramix? The second is how many pages of paper do you print to paper on a quarterly basis?

Please click the button and complete the survey!

Take the Survey Now!

In Case You Missed It: Panoramix YOUniversity is Now Live!

Our latest webinar is now available for on-demand viewing! In this 25-minute session, we take a deep dive into supplementing Blotters with Excel and Word.

Watch the Webinar Now!

Plus, if you missed our November session on Panoramix tax features, you can catch up **here.**

Where to Find Us: Upcoming Industry Events

We love meeting our partners in person! Here's where you can find us in the coming months. Stop by to say hello, see what's new with Panoramix, and get answers to your questions!

Join us May 27-30 in Tampa, FL, for SYNERGY25—an RIA-focused event packed with insights, training, and the latest advisor tech. Stop by to connect with the Panoramix team, get tips, and see what's new!

Reminder: Joe Lucking's Schedule Change Starts Soon!Starting April 1st, Joe Lucking, Director of Operations, will shift to a Tuesday–Thursday, 8 AM–5 PM CT schedule as he moves toward full retirement in 2027. He'll focus on enhancing Panoramix's orientation materials and help documentation, while our dedicated team continues to provide top-notch advisor support.

"It's been a fantastic journey, and I'm grateful for both the team and our advisors," Joe said. "And no, despite the date, this isn't an April Fool's joke—it's really happening!"

Since Joe will be in the office less, please remember to email Support@PanoramixFinancial.com to ensure nothing gets missed!

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, April 8th, 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.)

And remember that you may access all prior webinar recordings at any time in the Help Guides Here.

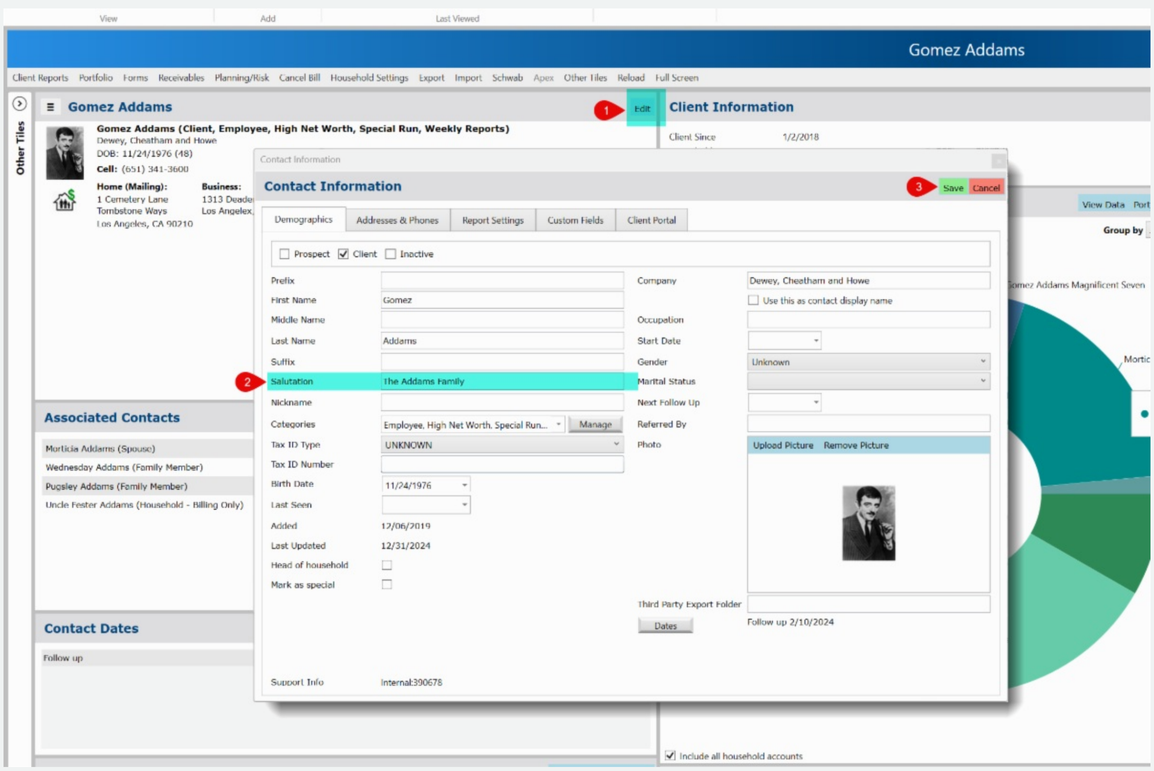
Make Your Client Communications More Personal with Salutations!

Want to add a personal touch to your

client interactions? The Salutations field in Panoramix lets you customize how clients' names appear in reports, emails, and other communications. Instead of defaulting to formal full names, you can tailor greetings—whether it's "Dr. Smith," "John & Jane," or "The Anderson Family."

This feature is especially useful when working with multiple contacts under the same account or when you have clients with the same name, helping to avoid confusion and ensure clarity in your messaging. Allowing you to present information in a way that best suits your clients' preferences.

To start using the Salutations field, follow these steps: 1.Open the **Client Dashboard.**
2.Click **Edit** and navigate to the **Demographics tab.**
3.Locate the **Salutation** field and enter the desired name.
4.Click **Save** to apply the changes.



If you want to learn more, check out our Help Guides **Client Dashboard** video here: Client/Contact Dashboard Training Video

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

Stay Ahead with Panoramix!

LinkedIn

Don’t miss out on the latest product updates, expert insights, and strategies to keep your firm at the top.

Be the first to know about new features
Gain expert strategies from industry leaders
See behind the scenes at Panoramix

Follow us on LinkedIn today and stay ahead of the curve!

Plan Ahead: Our Summer Holiday Schedule

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

- Good Friday, April 18th 1/2 day
- Memorial Day: Monday, May 26
- Juneteenth: Thursday, June 19
- Independence Day: Friday, July 4
- Labor Day: Monday, September 1

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

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

- Added Enhanced Summary client report
- Completed initial work on custom chart colors for asset classes, asset types, and security types—currently available in the Enhanced Summary report.
- Added 7-year and 10-year time segmentsto all applicable reports.
- Added the ability to display full account numbers in reports

Read more: February 27th, 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

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