May 8th. 2025

NEWS & UPDATES

What's New in Panoramix 3.0.32.0!

This release comes with a couple of highly requested enhancements! You can now **combine positions from multiple accounts** when generating a performance report using non-account group parameters—making single time frame reports even more flexible. Plus, **AdvicePay has officially been added** to the Third Party Data configuration menu, opening up new integration possibilities.

Additional updates include:

- Added a visual indicator when viewing a Head of Household's Client Dashboard.
- Added the ability to generate Fee Invoice reports in landscape mode.
- Added a check to prevent user from deleting asset classes and asset types that are included in a blended allocation.
- Corrected an issue where opening a link from the Market Watch tile would redirect to an error page.
- Fixed an issue where the Account Performance Summary's chart would display duplicate colors under certain conditions.
- Fixed an error in the Transaction Summary report where selecting a single account and using the Since Inception parameter did not use the account's inception.
- Resolved an issue where creating a Fee Statement report with "True Invoice" option selected that did not display Total Fees Due in landscape mode.
- Updated the message displayed when opening files that are being used by another process.
- Updated the formatting of the Detailed Fee statement to include

additional lines when displaying Additional Fees.
- Corrected an issue where the Household Cash Advisor Dashboard tile did not return the proper values.
- Updated performance benchmark calculations.
- Updated the Schwab import to handle new transaction types.
- Updated the Fidelity import to handle new transaction types.
- Updated the Goldman Sachs import to handle new transaction types.

To see these updates, close all Panoramix windows and relaunch the app! Click here to see the full Release Notes.

Coming Soon: Panoramix + Smartleaf Asset Management

SAM Smartleaf Asset Management®

Our new collaboration will help firms grow by giving firms the option to outsource personalized, tax-optimized portfolio management to Smartleaf Asset Management (SAM). You stay in control of asset allocation and product choice. SAM takes on the day-to-day complexity of reviewing, rebalancing and trading.

Working with SAM, you'll be able to implement your tactical asset allocation changes in a day. You'll be able to choose a direct index for a client rather than an ETF via a simple choice on a pull-down menu. You'll be able to manage portfolios at the household level with tax optimization. You'll be able to document for each client how much you've saved or deferred in taxes through active tax management – typically more than your advisory fees. Most importantly, SAM frees your investor-facing advisors to do what is really important: spend time building trusted relationships with clients and prospects.

SAM leverages the automated rebalancing technology of its parent, Smartleaf, whose portfolio operations infrastructure is used by firms like SEI, Altruist, Zoe Financial, Altium/Hightower, Choreo and Clearstead to manage over $75B across more than 3,500 advisors and 350,000 accounts.

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, June 10th, 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.

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. We're excited to be giving a **Tech Talk** this year, so if you'll be there, be sure to check it out or stop by our booth to connect with the Panoramix team, get tips, and see what's new!

We're excited to attend **Insider's Forum, September 23–25 in New Orleans, LA**!
This top-tier conference—hosted by Bob Veres—brings together fiduciary advisors for thoughtful discussions, expert-led sessions, and future-focused strategy. If you're planning to attend, come say hi! We'd love to connect, share some tips, and show you what's new in Panoramix.

Smarter Account Searching in Panoramix!

We've made it easier to track down accounts—even if you don't have the full account number on hand. In Data > Find Account, there's now a Smart Match checkbox available when searching by account number.

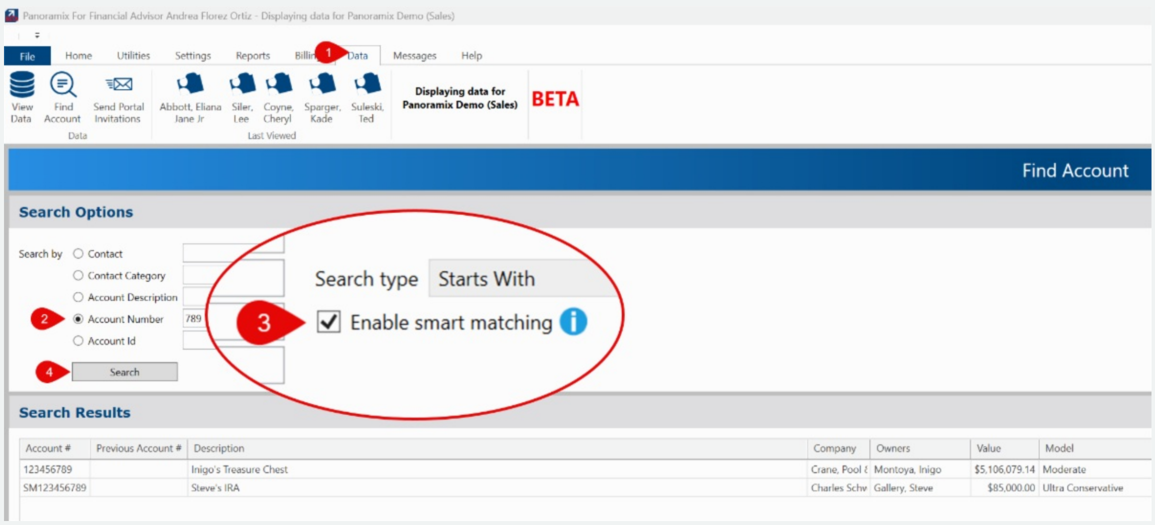
When enabled, Smart Match allows for more flexible searches so you can
- Find results that contain any part of the account number (not just those that begin with your search)
- Search without needing to know custodian prefixes or leading zeros

- Quickly locate accounts even if you only remember the last few digits

How to Use It:

1. Go to Data > Find Account
2. Enter part of the account number into the search bar
3. Check the box labeled Enable Smart Match
4. Hit Search and let Panoramix do the rest!

Here's where to find it:



It's a simple update that can save you valuable time and reduce search frustration—give it a try!

Learn at Your Pace: Panoramix YOUniversity

Whether you're a new user or a seasoned pro, our Panoramix YOUniversity webinars are packed with practical tips and real examples to help you get the most out of the platform. From billing and reporting workflows to integrations and customizations, each session walks through real advisor use cases—no fluff, just clear steps.

Missed a session? You can always watch on demand—like our latest one on using Excel and Word with Blotters, or revisit tax features in Panoramix from November.

Watch the Webinar Now!

Pair webinars with our in-depth Help Guides for a full training toolkit—available anytime under the Help tab!

Check out the Webinar Playlist on Youtube or you can find them on our Help Guides Page!

Plan Ahead: Our Summer Holiday Schedule

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

- 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!

Reminder: Joe Lucking's Schedule Changes In Full Effect!

As of April 1st, Joe Lucking, Director of Operations, works a Tuesday–Thursday, 8 AM–5 PM CT schedule as he transitions toward full retirement in 2027. He focuses on enhancing Panoramix's orientation materials and help documentation, while our dedicated team continues to provide top-notch advisor support.

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

Missed our last newsletter? Here's a few things you missed:

- Benchmarks now reinvest dividends by default; performance reports include a toggle for this.
- Batch Reports history can now be exported to Excel.
- Filter out inactive clients and $0 accounts in Edit Account Data.
- Filter by Contact Categories in Redtail, Wealthbox, Nitrogen, and Zoho integrations.

Read more: April 15th, 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 support meeting with James & Andrea

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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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.

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