



July 17th, 2025

NEWS & UPDATES



Panoramix 3.0.39 is Here: More Control, Better Web Tools

This release marks the beginning of exciting updates to the Panoramix Web experience. You can now customize your Advisor Dashboard layout online—choose which tiles you want to see the moment you log in. We've also added access to global report settings in Web, along with a series of fixes to improve report accuracy and third-party data settings. Check out the full list of enhancements below.

- Implemented the first stage of enhancing Panoramix Web. A customizable Web layout is now available. Advisors may choose which tiles are displayed on the advisory dashboard when logging in to Panoramix Web.
- Added the ability to modify global report settings in Panoramix Web.
- Resolved an issue where generating a Portfolio Snapshot report on Panoramix web displayed only one account's data instead of the household's.
- Fixed an issue where the Schwab Settings in the Third Party Data Settings menu did not display correctly.
- Corrected an issue where the Asset Change Summary advisor report would return a blank report when a custodian was not selected.
- Resolved an issue where the amount displayed in the Cash Value field on Edit Account screen could not be set to \$0.

And if you're wondering about the NEW customization options for the web Advisor Dashboard, be sure to check out Andrea's Insider Tip for a quick

walkthrough!

To see these updates, close all Panoramix windows and relaunch the app. Click [here](#) to see the full Release Notes.

In Case You Missed It: A Mid-Year Boost for Tax-Aware Planning

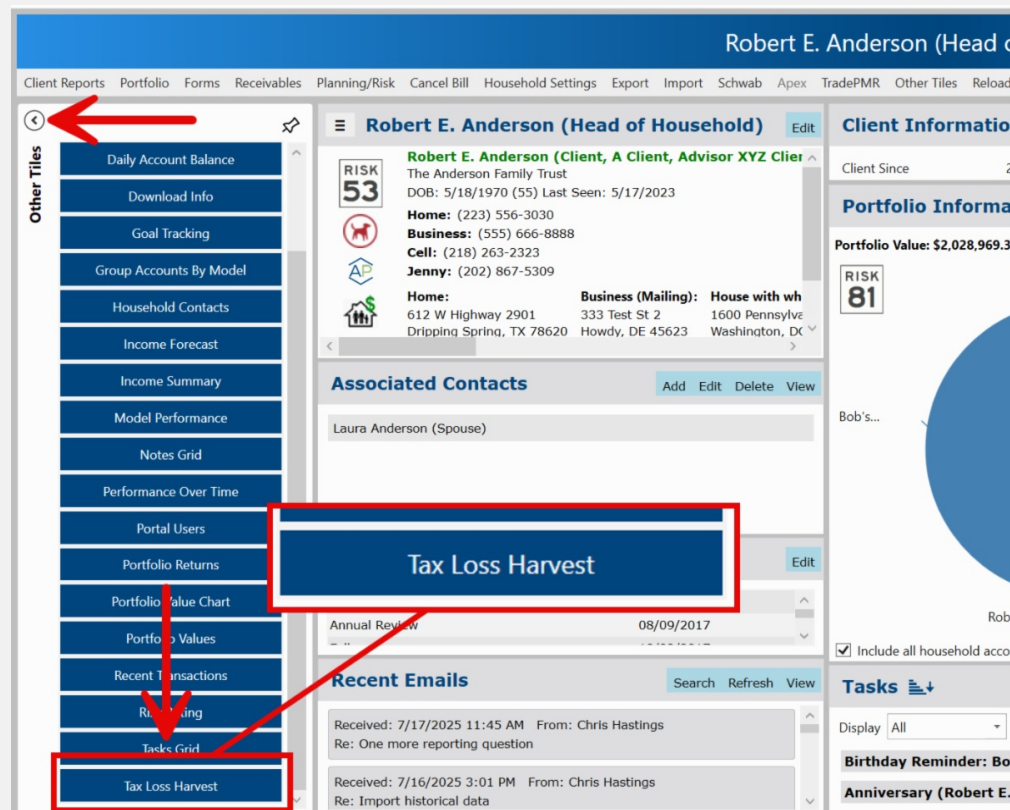
Earlier this summer, we rolled out our new Tax Loss Harvesting feature—another step forward in helping advisors stay sharp and tax-aware as we head into the second half of the year.

Built directly from advisor feedback, this tool makes it easy to identify unrealized gains or losses across client or household accounts. Whether the tile lives on your default Contact Dashboard or not, it's always just a click away when you need it.

“As we continue developing advisor-focused tools, our goal is to make things easier, not more complicated,” said CEO Chris Hastings. “Tax Loss Harvesting joins our built-in RMD calculator in a growing lineup of tools that help streamline your daily work and improve client outcomes.”

[Read the full press release](#)

Where can you find it? In the Client Dashboard > “Other Tiles” expander.



Reflections from Side Lake

At the halfway point of the year, our CEO Chris Hastings shares a few thoughts on independence, from lakeside traditions to how we build software at

Panoramix. It's a quick, meaningful read (with hash browns).

A great reminder of what freedom really looks like—both on the beach and in business.

[Read the full post](#)



Want more updates like this? [Follow us on LinkedIn](#) to stay connected.

Panoramix Live Q&A: Get Answers on the Spot!

Got questions? Get answers right on the spot. Join our free Panoramix Q&A open forum and connect live with our support experts. No tickets, no wait. Just clear, direct help in real time. Drop into the Support Open Forum via Microsoft Teams and ask away!

When: Tuesday, August 12th, at 1:00 p.m. Central

Where: Microsoft Teams

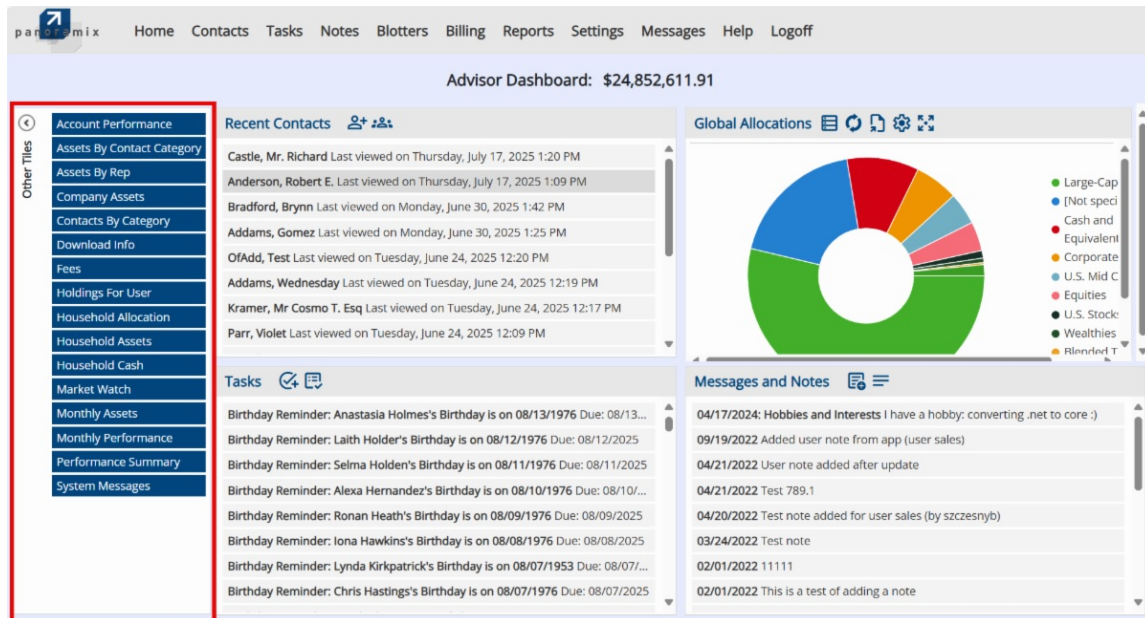
[Reserve Your Spot Now!](#)

(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](#).

Tips & Tricks: A Dashboard That Works Your Way!

You asked, and it's here. The “Other Tiles” expander is coming to the web version of Panoramix! That means you can now customize your **Advisor Dashboard** to fit the way you work best. Want quick access to Tax Loss Harvesting? Need Monthly Performance front and center? It's all up to you.

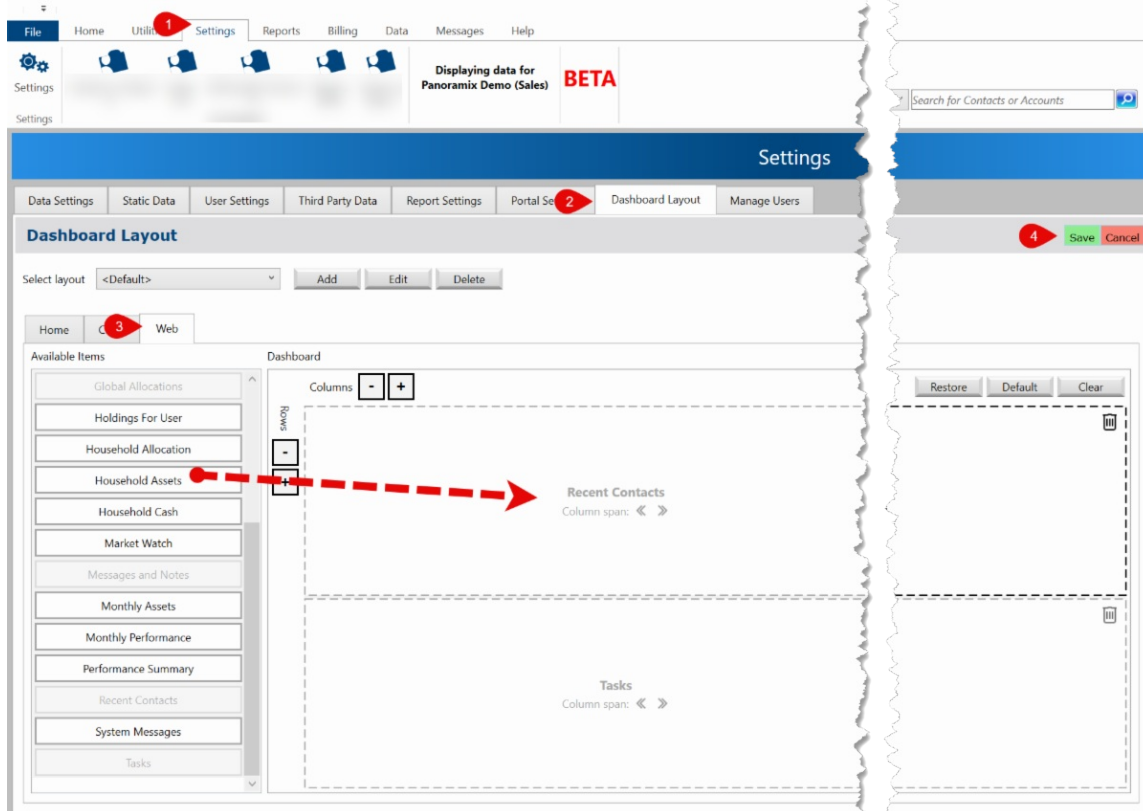


To make changes, just hop into the Panoramix desktop app and head to:

Settings > Dashboard Layout > Web tab

Choose the tiles you want by dragging an item from the list on the right onto a tile, arrange them how you like, and click Save!

Next time you log into the web app, your dashboard will look exactly how you want it because your tools should work the way you do!



♂ The Year's Halfway Mark Finds Us on the Move

While the calendar says mid-July, our conference calendar is just heating up. From early stops this spring to upcoming events later this year, we've had some great face time with advisors—and we're just getting started. Here's a quick look at what's ahead:

Honored to Attend The Wealthies

Panoramix Financial will be attending the 2025 WealthManagement.com Industry Awards Gala on September 4 in New York City. This black-tie evening celebrates excellence and innovation in advisor-focused solutions. If you're heading to the event, come say hi—we'd love to connect and toast to industry innovation!

September 4 | New York, NY

Panoramix Financial is a **two-time finalist** in the 2025 WealthManagement.com Industry Awards!

- Corporate Social Responsibility for our Carbon Neutral initiative
- Retirement Income Technology for our RMDs enhancements

A big congratulations to our fellow finalists who share our dedication to quality, innovation, and serving advisors.

[View the full list of finalists »](#)

Industry Recognition

2025 Wealth Management.com Industry Awards Finalist



panoramixfinancial.com

Next Stop: Insider's Forum

We're heading to Insider's Forum in New Orleans this September! Hosted by Bob Veres, this event brings together fiduciary advisors for high-level conversations, expert-led sessions, and practical insights. If you're attending, be sure to stop by—we'd love to connect and show you what's new in Panoramix.

September 23–25 | New Orleans, LA

[Explore the event »](#)



We'll See You at FPA ASCEND

We're excited to join the advisor community right here in our own backyard this fall at FPA ASCEND, October 21–22 in Minneapolis. It's always great to connect with planners and professionals focused on growth—and even better when it's local! If you'll be there, come find us and catch up on what's new in Panoramix.

October 21–22 | Minneapolis, MN

[Check out the event »](#)



Plan Ahead: Holiday Closures

Heads up! We will be closed Labor Day: Monday, September 1

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

Missed our last newsletter? Here's what we covered:

- **New Wealthbox Contact Matching Utility** – Match, update, and sync contacts with more control and visibility.
- **Billing Setup Enhancements** – New ability to set Billing Cycles at the household level.
- **Updated Email Template Settings** – Customize your email subject lines and messages per report type.
- **Two New Dashboard Tiles** – Quickly access **Tax Loss Harvesting** and **Download Status** right from the Contact Dashboard.

Plus a few visual upgrades and behind-the-scenes fixes to keep things running smoothly.

Catch the full newsletter [here »](#)

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](#)

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

Sapphire Software Services | 1470 Englert Rd | Eagan, MN 55122 US

[Unsubscribe](#) | [Update Profile](#) | [Constant Contact Data Notice](#)



Try email marketing for free today!