August 7th, 2025

NEWS & UPDATES

Soak Up the Last Days of Summer with Panoramix 3.0.40!

We know it's tempting to stretch out every last bit of sunshine, and we fully support that. But before the fall rush hits, it's a great time to knock out a little pre-season cleanup.

Our latest update, Panoramix 3.0.40, is now live and includes a handful of enhancements to help you stay ahead. Look for improvements to report output and small fixes that smooth out your workflow. And if you're heading to any upcoming industry events, don't be surprised if you see us there!

Here are the latest updates and fixes you'll want to know about:

- Significant updates were made to the Client Portal and its setup.
  1. Updated the User Interface to include a more prominent Sign Out menu option.
  2. Replaced the upload documents icon with a text, adding clarity to its function.
  3. Added ability for portal users to drag and drop documents when using Upload Documents option.
  4. Users can set the default allocation that is displayed in the Asset Allocations Client Portal module.
  5. Added ability for Advisors to either select the default allocation type that is used in Asset Allocations module or hide that selection completely.
  6. Fixed an issue with client's Last Viewed date being set when Advisors were using "Launch Portal as Client" functionality from within the Panoramix.
  7. Added ability for Advisors to disable the portal users' ability to select

individual accounts when generating reports on the Client Portal.

- Added the ability to filter by Custodian in the Model Blotter.
- Updated the display of an account's last trade date to ignore reinvested dividend transactions.
- Resolved an issue where generating the Daily Account Balance report in a batch report would ignore selected start and end dates.
- Resolved an issue where copying a payout schedule, that contains payouts with monthly schedule, caused an error.
- Corrected an issue where the Clients with Symbol and Clients with Identifier advisory report would return a blank report under certain conditions.
- Fixed an issue in the Notes Blotter where notes imported from Redtail would not appear in the blotter.
- Addressed an issue where Summaries and Benchmarks do not appear after loading the Performance Blotter on Panoramix Web.
- Updated the 2FA setup UI on Panoramix Web.
- Updated the delete account functionality on Panoramix Web to match the Panoramix application.
- Added the ability to create custom fields for Accounts, Holdings, and Transactions on Panoramix Web.
- Corrected an issue where a user may encounter a blank page when accessing Panoramix Web.
- Resolved an issue where accessing the New Note menu from the File menu did not function as intended.
- Resolved an issue where accessing the New Task menu from the File menu would generate an error.

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

New Integration with TradePMR

We're excited to share that Panoramix and TradePMR have launched a new technology integration aimed at simplifying performance reporting and billing for RIAs. This collaboration allows for seamless daily data reconciliation and automates billing workflows, making it easier for advisors to stay efficient and focused on clients.

More automation, less manual work. What's not to love?

Read The Full Press Release

✍ Reflections from Side Lake: Pi, Perspective, and the Power of Approximation

July 22nd was Pi Approximation Day, and in his latest Reflections from Side Lake, Chris used the occasion to explore how close can still be meaningful, whether in math, leadership, or life at the lake. It's a thoughtful reminder that perfection isn't always the point.

Read the full post

Want more updates like this? Follow us on LinkedIn to stay connected.

Counting Down to the Wealthies

The **2025 Wealth Management Industry Awards** are just a few weeks away, and we're honored to be named finalists in two categories:

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

Being recognized is meaningful, but it's your ongoing support that truly drives us. The feedback, ideas, and conversations we have with advisors every day are what shape Panoramix into something better. We don't take that for granted.

To celebrate, we've launched a fun little series called **#WealthiesWednesday** on LinkedIn and Facebook. Follow us there for weekly posts leading up to the awards and join in on the excitement!

Watch our first Wealthies Wednesday post:
LinkedIn
Facebook

Thank you for being part of the journey. We're proud to stand alongside you.

☐ 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.

From Sunshine to Spotlight : On the Road with Panoramix

As summer winds down and fall draws closer, we're still on the move. With big events just around the corner, it's an exciting time to connect, reflect, and celebrate what's ahead. Here's a look at what's coming up:

We're Headed to The Wealthies
We'll be in New York City for the 2025 WealthManagement.com Industry Awards Gala. It's a black-tie evening that celebrates excellence and innovation across advisor-focused technology and solutions. If you're attending, come say hello!

September 4 | New York, NY

We’re proud to be named finalists in two categories this year and send a big congratulations to all of the firms recognized alongside us!

View the full list of finalists »

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 | St. Paul, MN

Check out the event »

Tips & Tricks: Customize Your Panoramix Web Layout

One size doesn't fit all—and now your **Panoramix Web dashboard** doesn't have to either. With the latest update, you can customize the layout of your advisory dashboard to show exactly what you want to see the moment you log in.

Whether you want a clean, minimalist look or a data-packed command center, it's up to you. **Add, remove, or rearrange tiles** to reflect the way you work best.

To customize your layout:
You'll need to log into the **desktop version of Panoramix** to make changes. Then head to:

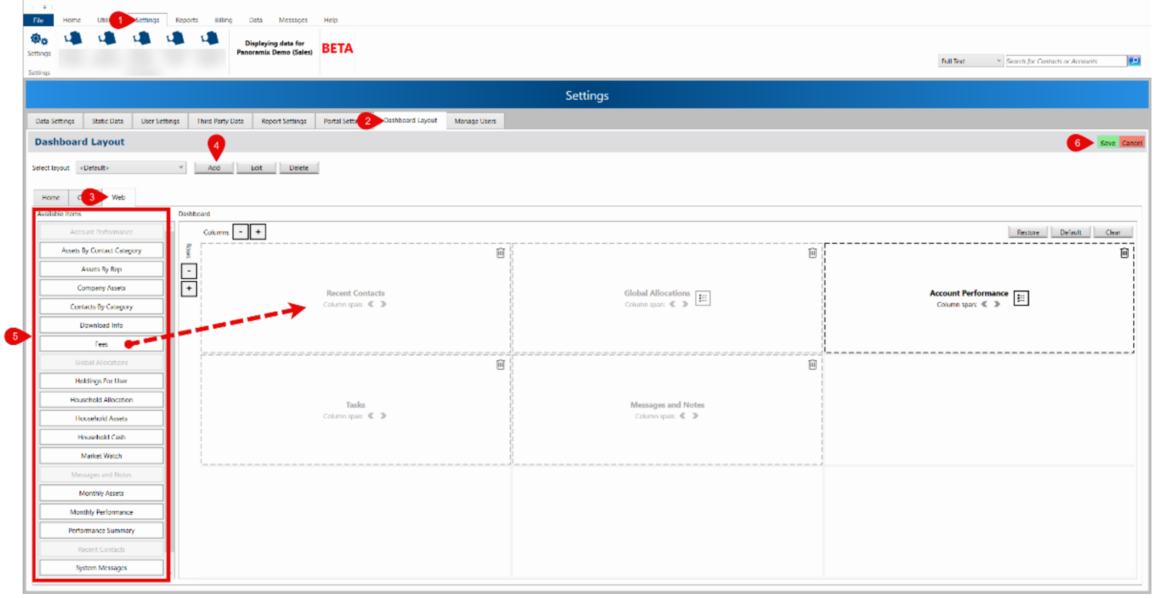
Settings tab > Dashboard Layout tab > Web tab

Pro Tip: Want to experiment without losing your current setup? Click the **Add** button next to "Select Layout" to create multiple saved layouts. You can build different versions and switch between them anytime.

In the **Web** tab, you can add multiple rows and columns, then **drag and drop tiles** wherever you want them. You can also click the arrows on each tile to expand the space and fine-tune your layout even further.

Don't forget to click Save—then log out and back into Panoramix Web to see your changes take effect.

No more scrolling past tiles you don't use or hunting for the ones you do. A few quick adjustments can make a big difference in your daily workflow.



Plan Ahead: Holiday Closures

Heads up! We will be closedLabor 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:

- **Panoramix Web Enhancements** – Customize which tiles display on your Panoramix Web dashboard.
- **New Schwab Download Info Tile** – Easily check data delivery status and snapshot dates by Rep ID.
- **Billing Group Tiering Display** – Now shows the tiered AUM amount used in fee calculation.
- **Performance Blotter Update** – Includes a new “Price Date” column to help verify pricing sources.

Plus a few behind-the-scenes fixes to keep everything 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