August 28th, 2025

NEWS & UPDATES

A Decade of Panoramix Innovation Continues with Release 3.0.41

This month marks a big milestone for us: Panoramix is officially 10 years old! Over the past decade, we've grown alongside advisors like you, and we wouldn't be here without your trust, feedback, and partnership. Every enhancement we've made and every step forward has been shaped by the community of advisors who continue to challenge us, support us, and inspire us.

As we celebrate 10 years, we also want to say thank you. Panoramix is what it is today because of you. And while it's been a meaningful journey so far, we're just as excited about what's ahead.

Our latest release, Panoramix 3.0.41, is now live, bringing enhancements to reporting and a series of small but meaningful fixes to keep things running smoothly.

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

- Added an upgrade to task management.
    - Added Task Groups. Users can create dedicated Task Groups that can contain multiple users.
    - Added Task Workflows. Workflows can be created as single or multi-step tasks that can be assigned to an individual user or a task group.
- Added "My Benchmarks" - ability to select which benchmarks (and in

what order) will be displayed in the list in report parameters
- Added ability to display “Performance vs. Benchmarks” chart on Portfolio- And Account Snapshot reports
- Added a Compact Display parameter to the Performance Blotter. This hides the group columns and displays the time-weighted return along with the beginning and ending values of the displayed period.
- Added the ability to hide the Weighted Flows displayed in the Fee-Invoiced Detailed report.
- Improved the performance of the data queries for Clients with Identifier and Clients with Symbols advisor reports.
- Correcting an issue where deleting a parent folder in Documents would cause an error.
- Fixed an issue where uploading files to a folder using drag-and-drop causes the display to appear "frozen".
- Fixed an issue that occurs when leaving the setup menu in the Performance Over Time module while loading causing the display to not refresh properly.
- Addressed an issue where the End-of-Month Securities Values list in the Account History did not clear previously displayed account values if there are no snapshots for currently specified account after recomputing performance for the account.

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

Meet Your New HelpBot

You may notice a new “friend” under the **Help** menu—our brand-new HelpBot! This early release is designed to answer your Panoramix questions right where you work. Simply type in your question and see what the bot can do.

Because it’s new, HelpBot is still learning. We’re logging all the questions and answers so it can improve over time—but we can’t make it smarter without your help. The more you use it (and the more feedback you share), the better it will get.

Give it a try, and let us know what you think!

Counting Down to the Wealthies

The countdown is on—just one week until the**2025 Wealth Management Industry Awards**! We're nominated in two categories (yay!)—but what do they really mean?

- **Corporate Social Responsibility** – Our Carbon Neutral initiative isn't just about offsetting numbers on a spreadsheet; it's about acknowledging the responsibility we all share in protecting the world around us. By committing to reduce our footprint, we hope to model how fintech firms can contribute to a more sustainable future—because the work we do today impacts the communities our clients and their families live in tomorrow.
- **Retirement Income Technology** – Retirement planning is where advice gets personal. Our RMD enhancements make it easier for advisors to help clients understand and manage their distributions with clarity and confidence. That means fewer headaches, more transparency, and ultimately, a smoother path to financial security for retirees who depend on their income.

These categories matter because they reflect values—responsibility, clarity, and care for the people and communities we serve.

We've been celebrating with our**#WealthiesWednesday** series on LinkedIn and Facebook, and the excitement is building each week. Follow along and cheer us on as we get ready for awards night!

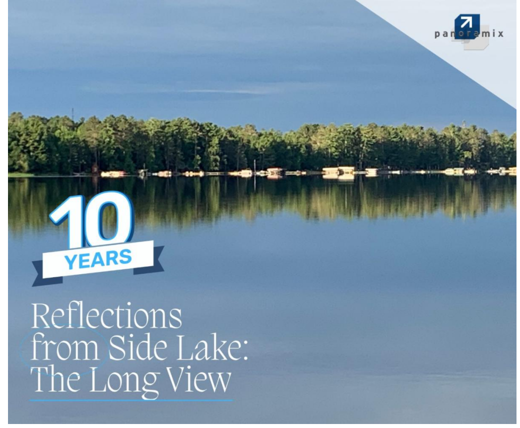
Catch our latest **#WealthiesWednesday** post:
LinkedIn
Facebook

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

Kickin’ It Small: Why Smaller Can Be Smarter

Thinking small might just be the smartest strategy for the future of wealth management. In his latest article, “Kickin’ It Small,” our Director of Operations, Joe Lucking, breaks down why boutique firms and nimble practices have a real edge in today’s environment.

Catch the full article here.



✍ Reflections from Side Lake: The Long View

What does a shoreline, a dock, and a decade of Panoramix have in common? In his latest Reflections from Side Lake, CEO Chris Hastings shares how quiet changes over time reveal just how far we’ve come. With Panoramix celebrating 10 years, it’s the perfect moment to pause, look back, and appreciate the growth.

Read the full post here

☐ 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, September 9th, 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.

New Feature Spotlight:

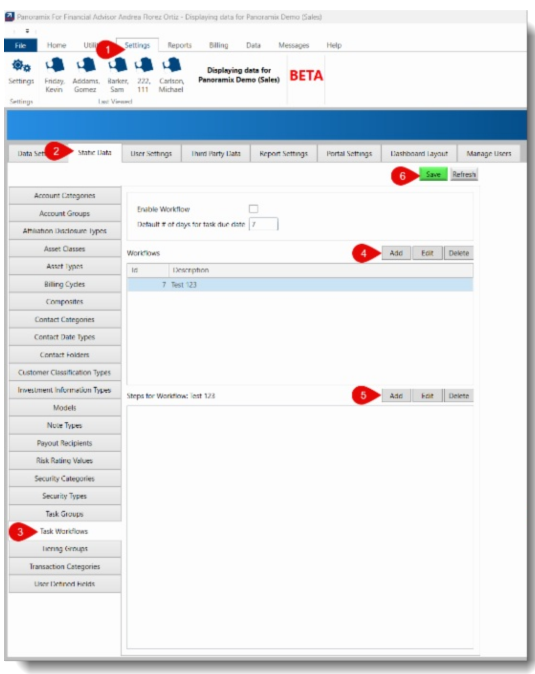
Task Workflows

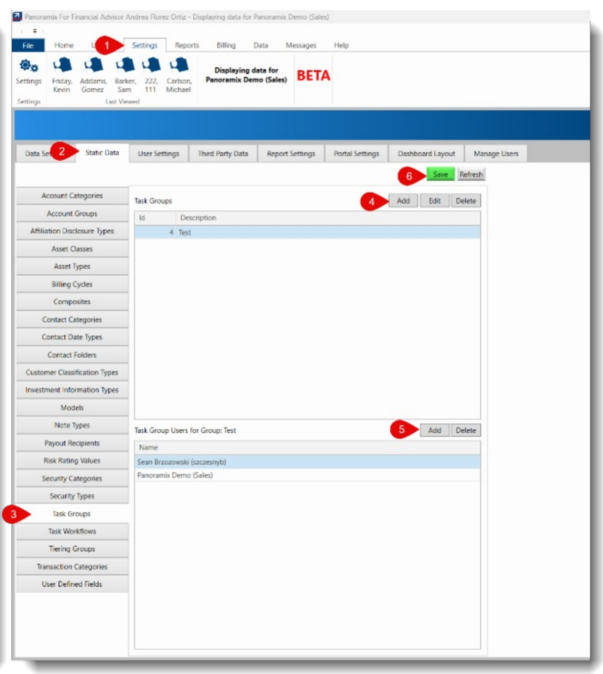
We're excited to introduce Task Workflows in Panoramix! Advisors can now create task groups and build out step-by-step workflows to better manage recurring processes.

Whether it's onboarding a new client, preparing for a review meeting, or running quarterly billing, you can outline the tasks in sequence and assign them one at a time.

Workflows run sequentially—meaning each step must be completed before the next one is assigned—so nothing slips through the cracks. To get started, create your Task Groups first, then build out your Task Workflows under **Settings > Static Data.**

This feature is still a work in progress, so we encourage you to explore it, try it out in your own processes, and let us know what you think. Your feedback helps us continue to refine and improve it!





On the Road (and Still Rolling) After 10 Years

Turns out, hitting the 10-year mark doesn't mean slowing down—in fact, we're busier than ever! Between black-tie galas, deep-dive forums, and hometown gatherings, we're celebrating a decade of Panoramix the best way we know how: out on the road with advisors. Here's where you can find us next:

We're Headed to The Wealthies

We'll be in New York City for the 2025 WealthManagement.com Industry Awards Gala. A little fancier than birthday cake and balloons, but we'll take it! This black-tie evening 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 finalists in two categories this year—and we’ll raise a glass to everyone recognized alongside us.

View the full list of finalists »

2025 WealthManagement.com Industry Awards Finalist

Next Stop: Insider’s Forum

Ten years in, and we’re still taking notes. Hosted by Bob Veres, Insider’s Forum brings fiduciary advisors together for high-level conversations, expert sessions, and practical insights. We’ll be in New Orleans to join the dialogue and share what’s new in Panoramix.

September 23–25 | New Orleans, LA

Explore the event »

Bob Veres' Insider’s Forum

We’ll See You at FPA ASCEND

No anniversary tour would be complete without a stop close to home. We’re excited to join the advisor community right here in Minnesota at FPA ASCEND. It’s always great to connect with planners focused on growth—and even better when it’s in our own backyard.

October 21–22 | St. Paul, 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:

- **Client Portal Enhancements** – New drag-and-drop upload, clearer menu options, and customizable default allocations.
- **Model Blotter Update** – Added the ability to filter by custodian for easier data review.
- **Daily Account Balance Report Fix** – Corrected an issue where selected start and end dates were ignored in batch reports.
- **Custom Fields on Panoramix Web** – You can now create custom fields for Accounts, Holdings, and Transactions.

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

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