September 18th, 2025

NEWS & UPDATES

Panoramix 3.0.43: Fresh Updates and a Wealthies Win

Fresh from winning a Wealthies award for Best Technology Provider: Retirement Income Technology—something we couldn't have done without you, just as we couldn't shape these releases without your invaluable feedback—we're excited to share the latest Panoramix release. Version 3.0.43 introduces redesigned summary reports, new document management tools, enhanced blotters, and added flexibility in billing—all aimed at making daily work smoother for advisors and clearer for clients.

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

- Replaced the Basic Summary and Investment Summary reports with new versions with updated look. Previous versions of these reports are available in the Classics Report menu.
- Added a new Holdings with Transactions report.
- Added End of Year Value as a basis in billing.
- Added the Advisor Document Vault to Panoramix Web.
- Updated the Customer Documents menu on Panoramix Web, users can now add, edit and delete documents.
- Enhanced the Performance and Composite Blotters, adding additional columns displayed while using the Compact Display setting.
- Added the ability for clients to delete previously uploaded documents in the Client Portal.
- Updated the Account Values widget on the Client Portal, clients can now select an account or portfolio that is displayed in the chart of the module.
- Added a new setting to the Account Values Client Portal module, users can now select if accounts or the portfolio values are displayed on the module in the Client Portal.
- Fixed an issue in Advisor folders where folders displayed would duplicate when the screen refreshed.

- Resolved an issue where filter values that were set in fields were not cleared between Panoramix sessions.
- Corrected an issue where tasks do not save when created when using Panoramix Web.
- Fixed an issue where the "Disabled by Administrator" icon is always displayed in 2FA Settings on Panoramix Web.

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

Panoramix Wins Wealthies Award for Retirement Income Technology!

At the **2025 Wealth Management Industry Awards** in New York, Panoramix was honored as the winner of the Best Technology Provider: **Retirement Income Technology category.** James and Kendra were on hand to represent Panoramix at the event and accept the award.

The recognition highlights the enhancements made to our built-in **Required Minimum Distribution (RMD) tool**, introduced in late 2024. These updates added nine new data points to support precise calculations for both current and prior years, along with comparisons against withdrawn amounts to help ensure tax code compliance. Unlike many calculators that only estimate based on current inputs, Panoramix applies IRS rules retroactively—helping advisors catch discrepancies and confirm adjustments, including those tied to pandemic-era relief provisions.

As CEO Chris Hastings noted, “We believe Panoramix now delivers the most robust RMD calculation tool on the market.” And the best part? It’s included at no additional cost for all Panoramix users.

Read the full press release →

The 2026 T3/Inside Information Survey is Now Open!

Last year, **Panoramix was ranked the #1 Portfolio Management Software** in the T3/Inside Information Survey for the seventh consecutive year. We earned an industry-leading satisfaction **score of 9.42** compared to a category average of 7.41, and our market share nearly doubled to 2.35 percent, making us the fourth-largest portfolio management system in the survey.

Your participation made that possible, and **we would love your support again this year.** The survey asks you to rate the tools you use on a scale of 1 to 10. If a category does not apply, simply skip ahead. Most advisors complete it in 15 to 20 minutes.

Why your vote matters:

- It helps shape the most respected technology survey in our industry
- It ensures independent advisor voices are represented
- It gives Panoramix the chance to continue our #1 streak

Take the 2026 T3 Survey here

Thank you for taking the time to share your experience. Your feedback not only helps Panoramix improve, it also helps highlight the value of independent technology built for advisors like 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, October 14th, at 1:00 p.m. Central
Where: Microsoft Teams

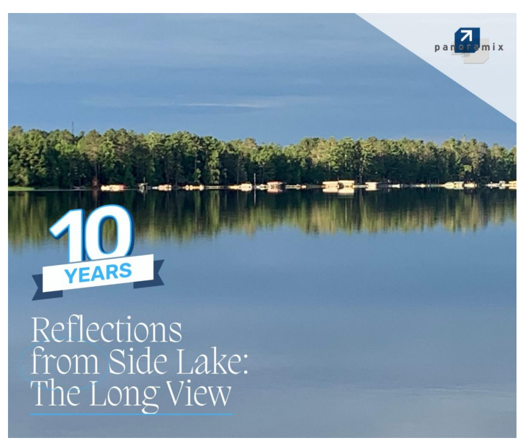
Reserve Your Spot Now!

(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.

Got a few minutes? Catch up on these articles

Kickin’ It Small: Why Smaller Can Be Smarter



✍ Reflections from Side Lake: The Long View

What does a shoreline, a dock, and a decade of Panoramix have in common? In his latest

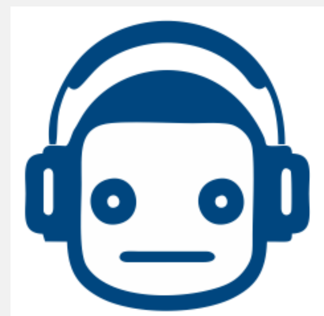
Thinking small might just be the smartest strategy for the future of wealth management. In his latest article, “Kickin’ It Small,” our Director of Operations, Joe Lucking, breaks down why boutique firms and nimble practices have a real edge in today’s environment.

Catch the full article here.

Reflections from Side Lake, 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

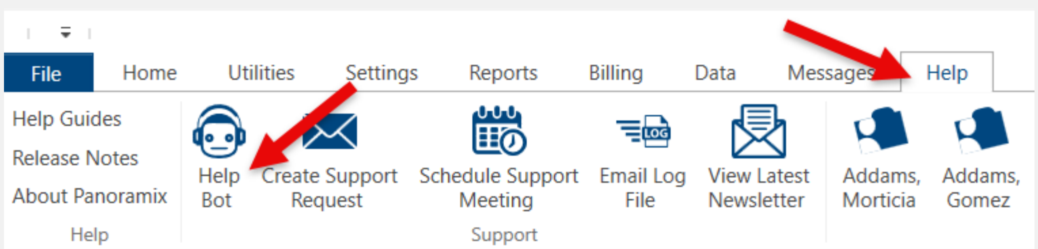
Meet Your New HelpBot



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!

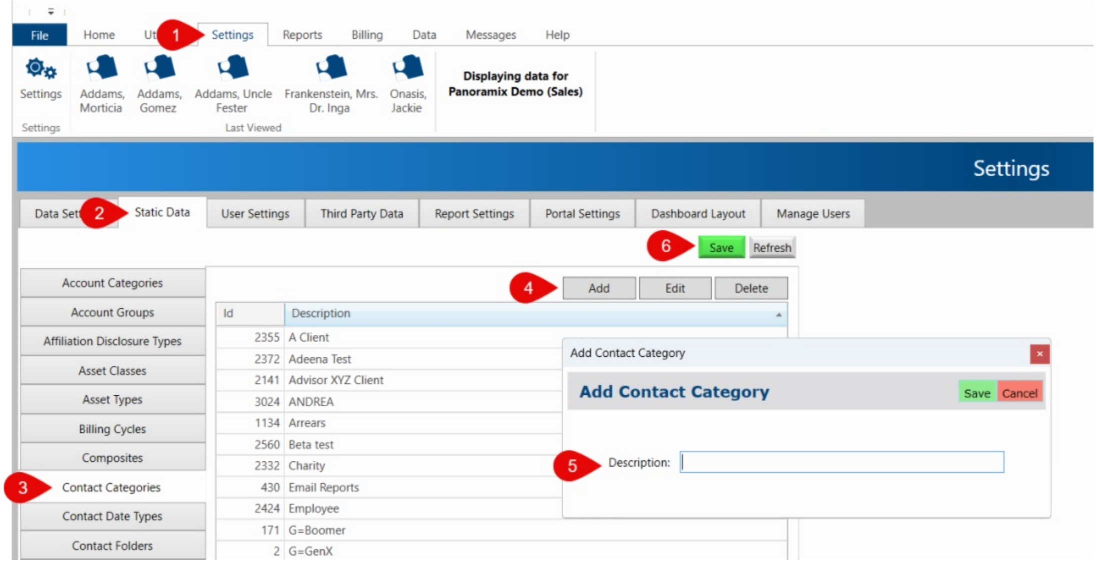


Tips & Tricks: Creating Categories in Panoramix

Categories are a flexible way to **organize clients, accounts, and transactions** in Panoramix. By creating your own categories, you can quickly filter data, run targeted reports, and keep things tidy.

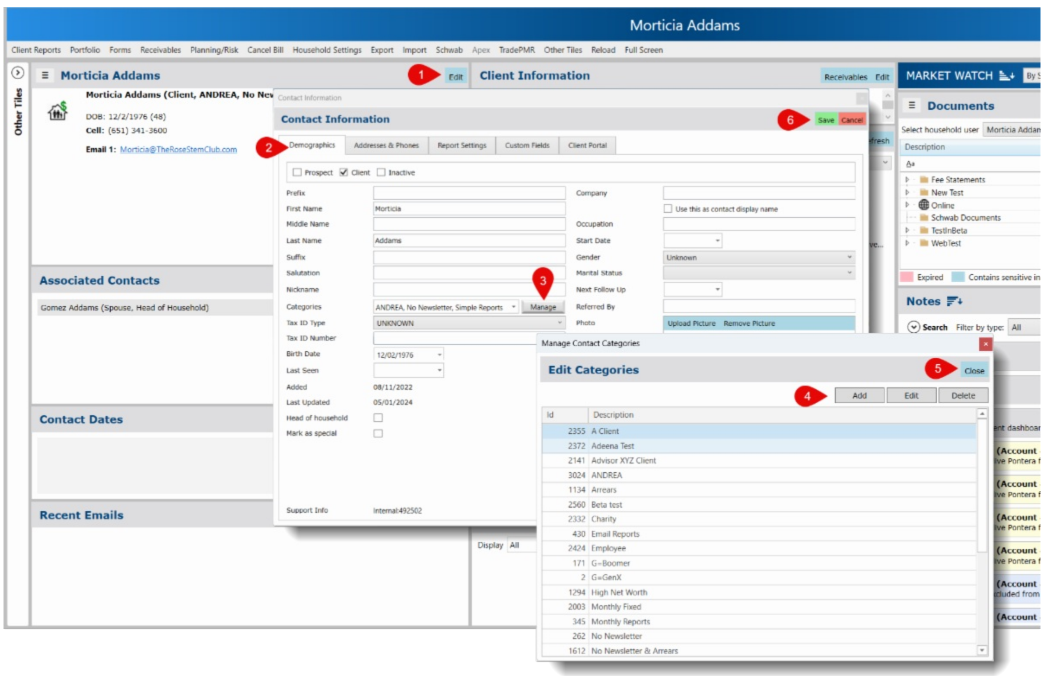
How to Create a Category:

1. Go to **Settings** > **Static Data** > **Contact Categories**
2. Click **Add** to create a new category (for example “High Net Worth,” “Bill Quarterly,” or “Email Reports”)
3. Give your category a clear name and save it



How to Apply a Category:

- From a **Contact Dashboard**, open the client record and select your new category from the drop-down
- You can assign multiple categories to the same client if needed



Where Categories Help:

• **Client Segmentation** Mark prospects separately from existing clients, or tag retirees so you can pull targeted retirement reports

• **Reporting Filters** Create a category for Inherited IRAs and run performance reports only for those accounts

• **Batch Reports** Send a quarterly report package to Trust Accounts or High Net Worth households without having to hand-pick them

• **Internal Tracking** Organize clients by advisor, region, or office location to make day-to-day management easier

• **Compliance** Separate Qualified vs. Non-Qualified accounts to make audits smoother

Categories aren't limited to clients. You can also set up**Account Categories** and **Transaction Categories** using their own Static Data settings tab. They work the same way, giving you flexible options to tag, group, and report across different types of data.

Where to Find Us Next ✈

Next Stop: Insider's Forum
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 »

We'll See You at FPA ASCEND
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: Our Fall & Winter Holiday Schedule

Heads up! We'll be closed for the following holidays:

- **MEA Weekend** – October 16th & 17th (Light Staff)
- **Thanksgiving** – November 27th & 28th
- **Christmas Eve** – December 24th (Half Day)
- **Christmas** – December 25th
- **New Year's Eve** – December 31st (Half Day)

- **New Year's Day** – January 1st, 2026

Enjoy the festive cheer and cozy nights, and be sure to check back for more holiday updates!

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

- Added an upgrade to **task management**.
- Added **"My Benchmarks"** - ability to select which benchmarks (and in what order) will be displayed in the list in report parameters
- 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 ability to display **"Performance vs. Benchmarks"** chart on Portfolio and Account Snapshot reports

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