October 16th, 2025

NEWS & UPDATES

Panoramix 3.0.45 Is Here!

This release brings a mix of enhancements, new features, and performance improvements designed to make your day-to-day work in Panoramix smoother and more flexible. You can now **customize your Panoramix Web dashboard layout directly in the web app**, view **GIPS Summaries in the Composite Blotter**, and take advantage of new **grouping options in the Generated Fees Grid**. We've also added several refinements to reporting, including updates to **Holdings with Transactions, Asset Change Summary,** and **Accounts Summary reports**.

Here's a full look at what's new and improved in version 3.0.45.0:

- Added ability to customize dashboard layout used in Home page of Panoramix Web directly in the web app.
- Added a GIPS Summary screen to the Composite Blotter.
- Added an expanded parameter to the Generated Fees Grid, allowing grouping of displayed data by columns.
- Added several parameters to the Holdings with Transactions report, including the ability to hide zero value holdings, additional group by settings and to expand holding details.
- Updated the Asset Change Summary report to include a multi-select option when selecting the Rep Code filter.
- Updated Client Portal to use individual colors of Asset Classes, Asset Types and Security Types allocations in Asset Allocation Chart module.
- Updated the formatting of Clients with Symbol and Clients with Identifier reports for better readability.
- Added the ability to include multiple addresses as recipients to Client Portal Document Upload notifications.
- Added ability to reassign Fee Schedules or Payout Schedules that are connected to Households prior to deleting them.

- Updated the Exclude from Allocation account setting to also remove accounts from all allocation reports and charts.
- Updated the back-end processes to improve load times of the Edit Account Data menu.
- Replaced the Accounts Summary report with a new version with updated look. Previous version of the report is available in the Classics Report menu.
- Remediated an issue where Notes would not display on initial load of the Contact Dashboard.
- Corrected an issue where updating the task order in a Workflow would not save correctly.
- Addressed an issue where the Global Allocations module would produce an error under certain conditions.
- Corrected an issue where Money-Weighted Benchmarks were not calculated correctly on the Portfolio and Account Snapshot reports.
- Updated an issue where exporting the Birthdate field from a blotter would include an empty time component.
- Corrected an issue in the Client Portal where switching the type of asset allocation didn't display a correct chart in the Asset Allocation Chart module.
- Fixed an issue on Panoramix Web where setting a client to Inactive would not save.
- Resolved an issue where importing notes from Redtail would not set the Created by User.
- Updated the Fidelity import to handle new transaction types.
- Updated the Betterment import to handle new transaction types.

Check out the full Release Notes here

Help Keep Panoramix #1 in the T3 Survey

Panoramix continues to lead the way. In the 2025 T3/Inside Information Software Survey, we were ranked the **#1 Portfolio Management Software** for the seventh straight year, earning an outstanding **9.42 satisfaction score** and nearly doubling our market share to 2.35%.

Your feedback made that possible, and we'd love your support again this year. The survey takes about 15 to 20 minutes and asks you to rate the tools you use most. If a category doesn't apply, you can simply skip it.

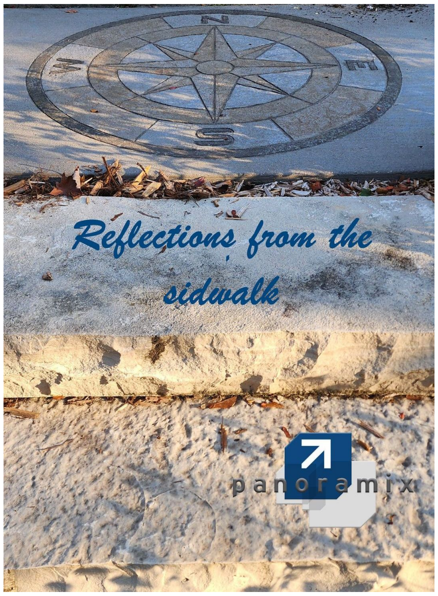
Why your input matters:

- It shapes the most trusted technology survey in our industry
- It ensures independent advisor voices are heard
- It helps Panoramix continue its #1 streak

Take the 2026 T3 Survey here

Thank you for sharing your experience and helping us continue to improve. Your feedback not only helps us grow but also highlights the value of independent technology built for advisors like you.

♂Reflections from the Sidewalk



Panoramix Director of Operations, Joe Lucking, shares a seasonal reflection that hits close to home for anyone in financial services. As the warm weather fades, he draws a thoughtful comparison between getting ready for snow and preparing for year-end tasks like RMDs, tax loss harvesting, and client reviews.

It's a great read for advisors looking to stay ahead of their own "winter," and a reminder that having the right tools in place makes all the difference.

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, November 11th, 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: Create a Folder for All Contacts

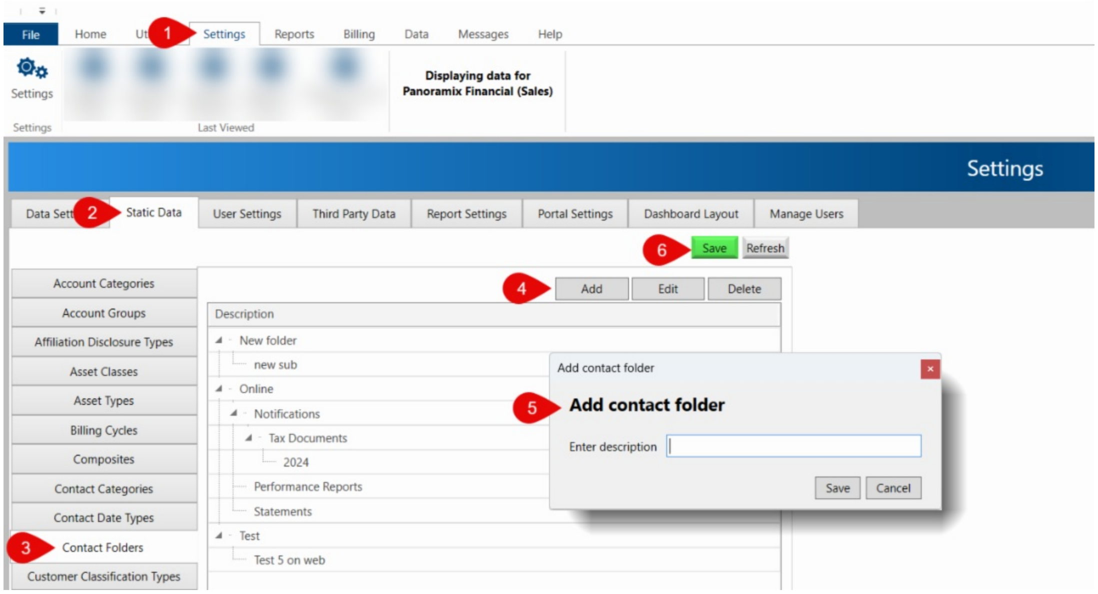
Keeping client documents organized is key, especially if your firm is moving toward a paperless setup or preparing for audits.

Creating a default folder for all contacts ensures every client record follows the same structure, making it easier to store, locate, and manage important files. It also saves time by applying the change across your entire database in one step.

Here's how to do it:

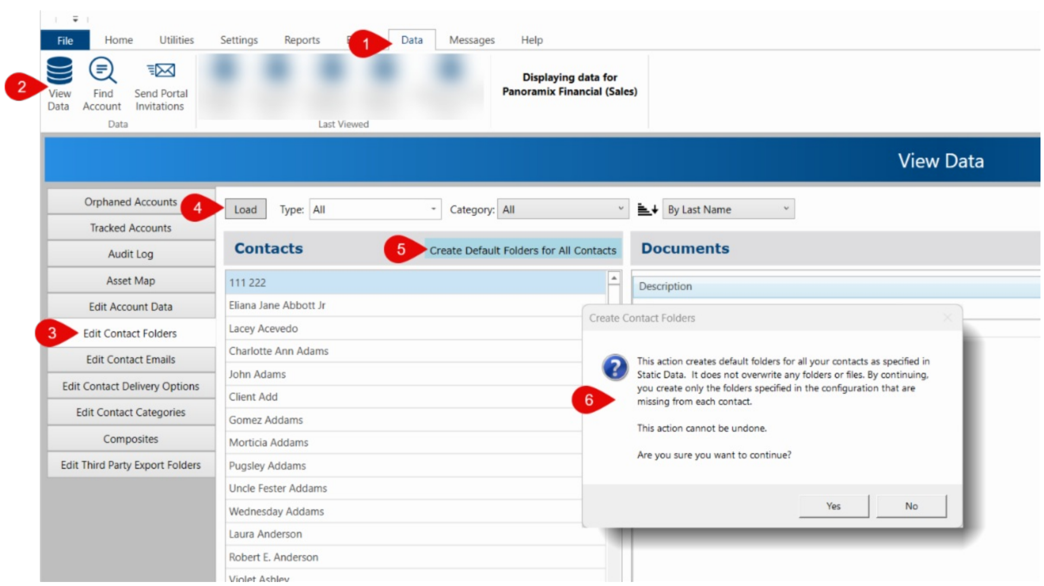
Add Contact Folder:

1. Go to Settings > Static Data > Contact Folders
2. Click Add, enter your folder name (for example, “RIA Documents”), then click Save and Refresh



Create Default Folder for All Contacts:

1. Next, go to Data > View Data > Edit Contact Folders and click Load
2. Click Create Default Folders for All Contacts and select Yes when prompted



That’s it! The new folder will automatically appear for every contact. From there, you can drag and drop documents into each client’s folder for easy access and storage.

Where to Find Us Next ✈

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 »

We'll See You at IMPACT 2025
We're excited to share that Panoramix will be attending IMPACT® 2025, taking place November 4–6 in Denver, Colorado.

We can't wait to meet with clients, partners, and advisors face-to-face. If you'll also be attending, let us know — we'd love to coordinate a time to say hello.

November 4–6 | Denver, CO

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 a new Holdings with Transactions report.
- Added End of Year Value as a basis in billing.

- Added the Advisor Document Vault to Panoramix Web
- 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.

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