

January 15th, 2026

## NEWS & UPDATES

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### **Panoramix Latest Updates Version 3.0.54**

As we kick off the new year, we're starting things off with a fresh set of updates and improvements in Panoramix. This release focuses on continued refinements, small enhancements, and fixes designed to keep things running smoothly as you move into the year ahead.

#### **Here's a full look at what's new and improved in version 3.0.54:**

- Added an SEC Audit menu to the SEC Reporting menu. This report will give detailed security information that has been requested in SEC audits.
- Added the ability to filter data in the Portfolio Dashboard for each of the Account, Holding, and Transaction grids.
- Enhanced the Close Account menu to allow users to select a close date, disable data download connection, and recompute account performance as of the selected closed date.
- Added Undo Account Closure as an account menu option.
- Updated the Account Contributions and Distributions report to display an account registration type and the report can be sorted by account description.
- Updated the Allocation Comparison report to show the difference in allocation as a percentage.
- Updated the Holdings Summary report to allow users to hide Income and Estimated income columns.
- Updated the displayed sort order of benchmarks to match the order specified in user's My Benchmarks setting.
- Updated the handling of special characters entered in an email address that prevented users from using the Launch Portal as Client feature.
- Updated the connected Email settings to support Microsoft 365/Exchange.

- Resolved an issue where using Mid-term billing and using the Weighted Flows Only value basis caused an error to be displayed.
- Corrected a display issue for report parameters on Panoramix Web and Client Portal when using a mobile or tablet view.
- Fixed an issue where merging contacts that had an associated contact relationship of “Other” would cause an error.
- Addressed an issue where Windows Display scaling settings may affect the scaling of some report elements when printed.

Make sure to close all Panoramix windows and restart the app so you can get the latest updates!

[Check out the full Release Notes here](#)

Didn't get the update? Use this [link](#) to download now!

## Last Call: Help Shape What's Next for Panoramix

As we begin the new year, this is your final opportunity to share feedback through the 2026 T3 Survey.

If you have a few minutes before it closes, your input helps surface real advisor needs and influences how technology providers like Panoramix prioritize future enhancements. Your perspective helps ensure the tools you rely on continue to evolve in ways that support your day-to-day work.

👉 [Take the 2026 T3 Survey here \(closing February 9th\)](#)

Thank you for taking the time to share your feedback and help shape what's next.

## Reading Corner 📖

### Reflections from Side Lake: 2025 in Review

As we begin the new year, Chris Hastings shares a thoughtful reflection on 2025 at Panoramix — a year shaped by steady progress, collaboration, and trust. From celebrating 10 years of Panoramix to meaningful platform enhancements and looking ahead to what's coming in 2026, this piece offers a candid look at where we've been and where we're headed.



👉 [Read “Reflections from Side Lake: 2025 in Review”](#)



## Panoramix Financial, Carbon Neutral Since 2024.


“[O]ur journey began in 2020 with our first emissions analysis. We refined the process in 2022 and 2024. Each iteration taught us more about our environmental impact and how to address it responsibly.” -Joe Lucking

Read more in "Wealth Management: 2026 Market Outlook" <https://lnkd.in/gcBVkgKH>



### 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, February 10th, 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](#).

### Panoramix on the Road



#### T3 Technology Conference 2026


 March 9-12, 2026 | New Orleans

The T3 Technology Conference 2026 will take place in New Orleans, Louisiana!

We're excited to be part of T3 again and look forward to connecting with so many of you in person — sharing ideas, hearing



#### SYNERGY26 hosted by TradePMR

 June 2–5, 2026 | Washington, D.C.

At SYNERGY26, advisors come together to connect, learn, and explore practical strategies and tools shaping the future of wealth management.

We're excited about this event and look forward to seeing familiar

your feedback, and talking about what's ahead for Panoramix. We hope to see you there!

faces — and meeting new ones — as we continue to grow and share ideas that help advisor practices thrive in the year ahead.

## Tips & Tricks: Managing Delivery Options in Panoramix



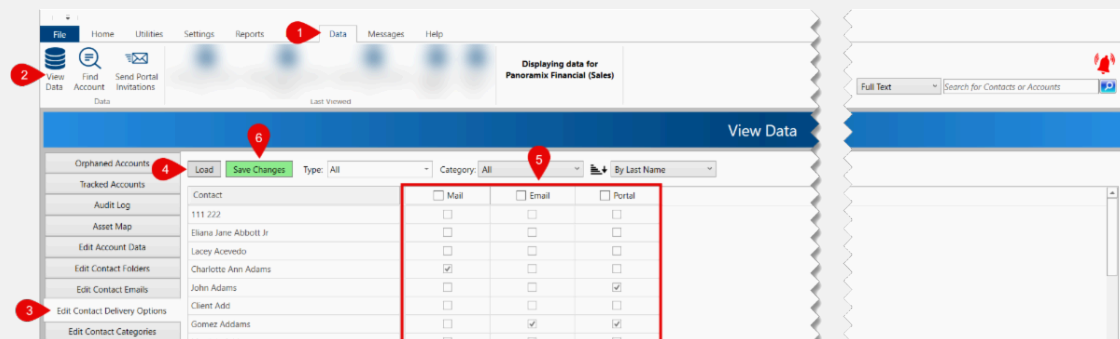
Looking for an easier way to designate how each client receives their reports — or to simplify batch reporting? Panoramix allows you to set preferred delivery options so reports and statements are delivered the way your clients expect, whether that's Mail, Email, Client Portal, or a combination.

### Delivery Options Explained

- Mail - Generates a PDF of the client's report or statement so it can be saved and physically mailed.
- Email - Sends the report or statement directly to the client's email address on file.
- Client Portal - Saves the document to the client's portal. The client will also receive an email notification letting them know a new document has been added.

### Where to Edit Contact Delivery Options

You can manage client delivery preferences here:  
**Data > View Data > Edit Contact Delivery Options**



From this screen, you can:

- Filter by Type (clients, contacts, prospects)
- Filter by Category (if contact categories are set up)
- Sort by Last Name, First Name, Age, or Zip Code

Once your filters are set, load the screen and check the preferred delivery method(s) for each client.

Be sure to click the green Save Changes button once updates are complete.

### Where Delivery Options Are Used

Delivery options apply when:

- Generating **Batch Reports** (Reports > Batch Reports > Generate Batch Report > Settings)
- Sending **Fee Statements** (Billing > Fee Statements)

Setting these preferences ahead of time can help make report delivery smoother and reduce rework.

Want to learn more? Check out our Full Batch Report Manual [here](#).

## 🧠 Don't Forget — New Stuff / Tough Stuff Is Here

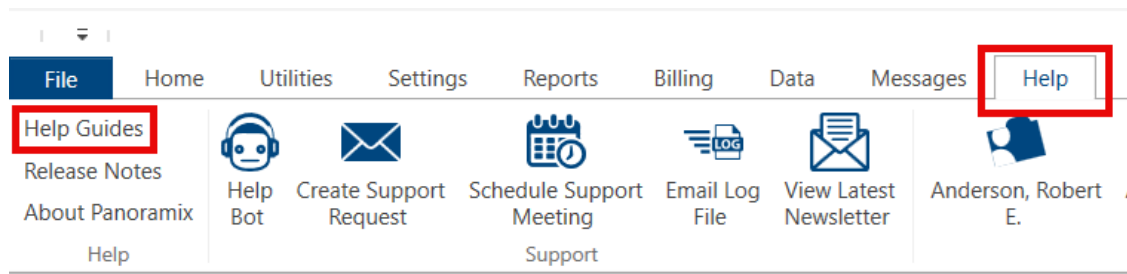
Just a reminder that our New Stuff / Tough Stuff section in the Panoramix Help Guides is available and continues to be a great resource for quick, practical walkthroughs on commonly asked questions.

Recent videos cover topics like:

- Average Daily Balance (Last 30 Days)
- Net Gains
- Average Month-End
- Ending Balance with Prorated Flows
- Weighted Flows Only

These sit alongside earlier videos on Form ADV, the Download Info Tile, the Billing Grid, My Benchmarks, New User Notifications, and more.

You can access New Stuff / Tough Stuff anytime from the Help tab inside Panoramix by selecting Help Guides — or directly from the Help Guides page.



Make sure to bookmark the page for quick reference and easy access anytime you need a refresher. Because gaining a little extra knowledge is always a win!

## Plan Ahead: Our Spring & Summer Holiday Schedule

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

- **Good Friday:** April 3rd, 1/2 Day
- **Memorial Day:** May 25th
- **Juneteenth:** June 19th
- **Independence Day:** July 3rd
- **Labor Day:** September 1 st

Enjoy the summer season, and be sure to check back for more updates throughout the coming weeks.

## Missed our last newsletter?

Here are a few things we covered in release 3.0.52:

- Continuing from release 3.0.51.0, additional modules were added to the Client Dashboard page of Panoramix Web.
- Added the ability to display Household Salutation as displayed name on the Client Portal.
- Added the recompute performance functions to account menus on Panoramix Web.
- Updated IRR and TWR calculations to better handle holding-level performance for positions that were fully sold out and later repurchased.

[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](mailto:Support@PanoramixFinancial.com).
- Call the Support phone line at 877-595-3282 available starting at 8 AM CST.
- [Schedule a support meeting](#)

## Need a quick refresher?

Click the buttons below to explore even more resources – Panoramix is your one-stop shop for getting things done efficiently!

[Help Guides](#)

[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

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