

Panoramix 3.x Release Fuels Record Sales Quarter

Panoramix announces best second quarter in ten-year history

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Panoramix, the premier platform for performance reporting and client billing for financial advisors, announces a record-breaking sales quarter following the launch of Panoramix 3.x, the latest iteration of its cutting-edge software. Packed with new features designed to elevate the advisor-client experience, Panoramix 3.x has already been hailed by industry professionals as an integral tool for modern advisory practices.



The latest update sets a new benchmark for performance reporting, billing efficiency, and practice management, helping advisors streamline their workflows and deliver more value to clients. The surge of interest from both new and existing customers has resulted in the highest sales month in the company's history, underscoring the growing demand for innovative financial technology solutions tailored for today's advisors.

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It's no coincidence that we release Panoramix 3.0 in May and by Q3 we see the best new advisory sales quarter in ten years.”

Joe Lucking, Director of Operations

A New Era of Efficiency with Panoramix 3.x

Panoramix 3.x is a significant leap forward, addressing the evolving needs of financial advisors in a rapidly changing competitive landscape. The upgrade offers several key features, including the following.

Advanced Client Reporting: Enhanced customization and visualization options allow advisors to deliver more intuitive performance reports, featuring detailed graphics, benchmarking, and personalized insights making it easier for clients to grasp the full scope of their investments.

Streamlined Billing Automation: The upgraded billing system includes flexible, automated fee calculations, tiered billing, and integrated payment solutions. Advisors can now set billing and payout schedules in just a few clicks, saving time and ensuring accuracy.

Seamless Integrations: Panoramix 3.x's improved integration capabilities create a unified ecosystem for financial professionals, reducing data entry and synchronization efforts while maintaining accuracy across platforms.

Compliance and Security Upgrades: In response to rising regulatory scrutiny, Panoramix 3.x delivers enhanced compliance reporting and data security, with real-time reports, audit trails, and advanced encryption to safeguard sensitive information.

User-Friendly Interface: Continuing its tradition of intuitive design, Panoramix 3.x features a redesigned layout for smoother navigation.

Core Performance Improvements: Panoramix 3.x dramatically cuts execution times, with some batch reports running as much as ten times faster than previous versions, slashing hours off processing times.

Record Sales Highlight Demand for Cutting-Edge Solutions

In the month following Panoramix 3.x's release, the company recorded its highest-ever monthly sales, driven entirely by new clients embracing the platform. This milestone underscores the value of cutting-edge technology in helping financial advisors boost efficiency, growth, and client satisfaction.

"Panoramix 3.x has resonated with advisors seeking to stay ahead in a competitive market," said Chris Hastings, CEO of Panoramix. "Our team worked relentlessly to create a product that addresses today's challenges and tomorrow's opportunities. The response has been extraordinary, and we're excited to continue driving innovation."

Looking Ahead

Panoramix aims to build on this momentum with ongoing updates and additional integrations to further streamline advisor workflows. "We're just getting started," added Hastings. "Panoramix 3.x is the first step in a broader strategy. Our mission is to equip advisors with the tools to deliver exceptional client value and drive business growth."

About Panoramix

Developed in 2013 by Sapphire Software Services, Inc., Panoramix™ provides portfolio

management and reporting software for RIAs and financial advisors. Specializing in billing and performance reporting, the Panoramix platform is multi-custodial and, with its wide array of partners and integrations, is flexible enough to integrate seamlessly into an existing tech stack, while still being robust enough to stand on its own. Panoramix is industry-recognized as a Kitces' Best Value (2023) and a top performer on the T3 Inside Information Survey six years running (2019-2024). Visit www.panoramixfinancial.com for more information.

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