

Panoramix Showcases Panoramix 3.x at IMPACT® 2024

Special Discount for Advisors Attending the Conference

EAGAN, MN, UNITED STATES, November 7, 2024 /EINPresswire.com/ -- Panoramix™, a leading billing and performance reporting platform for financial advisors, is pleased to announce the conference debut of Panoramix 3.x at Schwab's IMPACT® 2024, November 19-21, 2024, in San Francisco. Panoramix 3.x introduces a wide range of new features designed to streamline operations, enhance efficiency, and deliver cutting-edge solutions to financial advisors. Advisors attending IMPACT 2024 can get an up-close look at Panoramix along with a special discount available to advisors who are new to the Panoramix platform.



Panoramix 3.x builds on the platform's established reputation for delivering financial advisors best-in-class performance reporting and billing automation. This latest iteration includes major advancements that streamline workflows, provide deeper client insights, and improve compliance reporting. Attendees will see firsthand how these innovations enhance the advisor-client experience and simplify practice management.

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We look forward to talking with advisors [in San Francisco] and showing them what we have been up to [with Panoramix 3.0].”

Chris Hastings

Chris Hastings, CEO of Panoramix, said, "We are eager to

showcase Panoramix 3.x at IMPACT 2024. After being in preview and existing advisor conversion mode the past couple months, we're pleased to present the product to Schwab's advisor community. The new version has an updated integration with Schwab including full adoption of the new OATH2 authentication for all APIs. We are also building out our integration with

Schwab's iRebal® platform. We look forward to talking with advisors and showing them what we have been up to."

Panoramix 3.x introduces significant enhancements to client reporting, allowing financial advisors to deliver more intuitive performance reports, featuring detailed graphics, benchmarking, and personalized insights. The upgraded billing system includes new flexible billing methods, automated fee calculations, enhanced tiered billing, and integrated payment solutions. Advisors can now set billing and payout schedules in just a few clicks, ensuring accuracy, reducing the time advisors spend on administrative tasks. The platform also includes improved integration with custodial platforms like Schwab Advisor Center® and tighter integration with the Schwab API set, allowing for more efficient data handling and synchronization. Additionally, Panoramix 3.x addresses the increasing regulatory demands placed on financial advisors by providing real-time compliance reporting and robust data security protocols.

Panoramix is committed to ongoing innovation, and the showing of Panoramix 3.x at IMPACT this year represents a significant milestone. The company remains focused on supporting independent financial advisors by providing a robust flexible software platform accompanied by premium support at the best value. "Now that the entire technology platform replacement is complete in 3.0," Hastings said, "we look forward to delivering even more of what advisors need faster on the new platform."

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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