

# Panoramix Named a Finalist in the Wealth Management 2025 Industry Awards

*"Wealthies" Finalist for Corporate Social Responsibility and Retirement Income Technology*

EAGAN, MN, UNITED STATES, June 6, 2025 /EINPresswire.com/ -- Panoramix is a Finalist in two categories of the 2025 Wealth Management Industry Awards ("the Wealthies"): Corporate Social Responsibility and Retirement Income Technology. The company, which provides portfolio management, billing, and performance reporting solutions for RIAs and independent financial advisors, announced the recognition today.



Panoramix Logo

Begun in 2020, our carbon neutral program examines our organization's environmental impact. The initial analysis, as preliminary as it was, won a Wealthie in 2021 for Outstanding Achievement in Corporate Social Responsibility/Diversity. Between 2022 and 2024, Sapphire

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*Chris Hastings*

Software Services (the makers of Panoramix) reduced its own emissions in three of the four categories under its direct control or influence, with an overall reduction of 9%. For emissions not eliminated, the company purchased carbon offsets through the United Nations Voluntary Certified Emissions Offsets program.

Additionally, advisors—the downstream clients of Panoramix and the majority source of emissions

impact—reduced their own emissions by 76%, mainly because of several advisories going 100% paperless for statement and report delivery, which is made easy in the software.

“We're honored to receive this prestigious recognition as Finalist from [WealthManagement.com](https://www.WealthManagement.com),” said Joe Lucking, Director of Operations. “We're proud of the accomplishments achieved thus far

in becoming a carbon neutral firm. We are unaware of any other FinTech company making a similar claim, let alone any whose primary product is in the Portfolio Management space.”

The built-in Panoramix RMD tool also received a Finalist designation in this year’s Industry Awards. In 2024, we made Panoramix the “go to” tooling for properly calculated RMDs, especially for inherited IRAs. Panoramix added nine new data points for the express purpose of calculating RMDs for the current and past years, with a comparison to amounts withdrawn to verify tax code compliance. While many online tools, including those provided by the top custodians, calculate RMD amounts for the current year based on similar input parameters, Panoramix applies these rules to the account’s history as well, showing past variations, including special adjustments to requirements made during the pandemic years.



“Panoramix now has the most robust RMD calculation tool we’ve encountered on the market,” said Chris Hastings, CEO. “Our advisories have been quick to adopt this tool. The quick-and-intuitive input yields clear results, giving advisors confidence that they are advising their investors accurately when it comes to the complexities of calculating RMDs.”

Now in its 11th year, the Wealth Management Industry Awards is the only awards program of its kind to honor outstanding achievements by companies, organizations and individuals that support financial advisor success.

A panel of judges made up of top names in the industry, led by WealthManagement.com director of editorial strategy and operations David Armstrong, chose the finalists and will determine the winners, which each year recognizes the firms and individuals who are bringing new innovations to market that make a real difference to the daily activities of financial advisors. Winners will be announced at a gala and awards ceremony in New York City on September 4th.

“The Industry Awards are a beacon, illuminating the trailblazers and innovators who are shaping the future of the financial services industry,” said David Armstrong, director of editorial strategy and operations. “They serve as a leading indicator of future activity, and as a barometer for the dynamic ecosystem of companies and organizations that empower, support and enable advisor success who are driving the industry forward.”

#### 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](#) seven years running (2019-2025). For more, see [www.panoramixfinancial.com](http://www.panoramixfinancial.com)

#### About WealthManagement.com

WealthManagement.com, an Informa business, provides everything wealth professionals need to know to stay knowledgeable about the industry, build stronger relationships, improve their practice, and grow their business. WealthManagement.com offers financial services organizations a broad array of marketing services designed to help them influence the industry's leading audience of wealth management professionals.

Joe Lucking

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