

Panoramix Launches New Tax Loss Harvesting Feature, Enabling Advisors with Practical Portfolio Management Tools

With this release Panoramix enhances its growing suite of tax aware tools.

EAGAN, MN, UNITED STATES, June 25, 2025 /EINPresswire.com/ -- Panoramix, the intuitive performance reporting and billing platform built for RIAs and independent financial advisors, launched a new Tax Loss Harvesting feature in their latest release, expanding the platform's toolkit for proactive portfolio and tax management.

Developed in direct response to advisor feedback, advisors may now easily identify securities with

unrealized losses (or gains) across client/household accounts. This helps advisors efficiently implement tax-aware strategies while maintaining alignment with client goals. The easy-to-use interface enables advisors to access unrealized capital losses within client accounts across their book; filter and sort harvesting opportunities by loss thresholds, date ranges, or asset types; and leverage real-time portfolio data in support of ongoing tax-aware management strategies.

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Chris Hastings

The new feature considers prior transactions, flagging any tax lot containing wash transactions. This helps advisors maintain compliance.

“Tax loss harvesting is a time-sensitive and detail-driven process,” said Chris Hastings, CEO of Panoramix. “Our new feature set helps advisors surface opportunities at

scale—eliminating time-intensive manual tracking and guesswork. This feature came directly



Panoramix Logo

from advisor feedback, and we're proud to continue delivering enhancements that are both practical and impactful."

The Tax Loss Harvesting feature, now available to all Panoramix users at no additional cost, integrates seamlessly into the existing platform workflow. Advisors can run analyses across individual accounts or households, view embedded performance data, and export reports for client conversations or compliance documentation.

"This addition reflects our ongoing commitment to delivering advisor-focused innovations that improve efficiency, client service, and investment oversight," said Hastings. "The Tax Loss Harvesting feature in Panoramix joins the built-in RMD calculation tool to our growing list of recent enhancements supporting advisor workflows."

In addition, advisories using Panoramix Pro may generate trades directly with their custodian, or create trade files for same, from within the application.

To learn more about the Panoramix platform or request a demo, visit PanoramixFinancial.com.

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 the top performer on the T3 Inside Information Survey seven years running (2019–2025). Panoramix is, once again, a multi-times finalist in the 2025 Wealth Management Industry Awards. For more, see www.PanoramixFinancial.com

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