

Panoramix Wins Best Technology Provider: Retirement Income Technology in the 2025 Wealth Management Industry Awards

Panoramix elated with adding another "Wealthie" to the trophy case.

EAGAN, MN, UNITED STATES, September 10, 2025 / EINPresswire.com/ -- Panoramix, a portfolio management platform for RIAs and independent financial advisors, is the winner of the Technology Providers: Retirement Income Technology category at the 2025 Wealth Management Industry Awards (the "Wealthies"). This award highlights Panoramix's continued commitment to equipping advisors with innovative tools that enhance client outcomes and streamline advisory workflows.



Panoramix Logo

The judges selected the built-in RMD (Required Minimum Distribution) tool, introduced by Panoramix in late 2024, as the winning initiative in the Retirement Income Technology category. The enhancements made Panoramix a go-to solution for advisors seeking accurate and compliant RMD calculations, particularly for inherited IRAs. Panoramix added nine new data points to support precise calculations for both current and prior years, alongside a comparison against withdrawn amounts to help ensure tax code compliance.

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While many custodial and online calculators estimate current-year RMDs based on standard inputs, Panoramix

applies IRS rules retroactively, surfacing discrepancies and confirming adjustments from prior

years, including those related to pandemic-era relief provisions.

"We're honored to receive this prestigious award from WealthManagement.com," said Chris Hastings, CEO of Panoramix. "We believe Panoramix now delivers the most robust RMD calculation tool on the market. Our advisors have been quick to adopt the feature, which is included at no additional cost on the Panoramix platform. With just a few intuitive inputs, advisors receive clear, reliable results—giving them confidence when guiding clients through complex retirement distribution strategies."



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

"A record-breaking number of nominations were submitted in 2025, with over 1,200 entries received from more than 400 companies," said David Armstrong, Director of Editorial Strategy and Operations, Wealth Management Group – Informa Connect. "The Industry Awards program has significantly expanded in scope in the eleven years since it began, but the mission remains the same: To recognize and celebrate the outstanding initiatives undertaken by companies and individuals that contribute to the success of financial advisors in their businesses and foster improved outcomes for their clients."

Panoramix was selected as the Retirement Income Technology winner by a panel of independent judges made up of industry leaders who evaluated finalist initiatives based on quantitative (e.g., scope, scale, adoption, and feature set) and qualitative (innovation, creativity, and new methods of delivery) criteria.

This recognition is the second Wealthies win for Panoramix along with its previous honors as a winner in 2021 and a frequent multi-category Finalist. View a full list of previous honors on the Panoramix Financial website: <https://www.panoramixfinancial.com/home/awards/>.

See a complete list of the [2025 Wealth Management Industry Awards winners and finalists here](#).

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.

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