Panoramix Introduces FacetAI, a Practical AI Initiative Built for Financial Advisors

CEO Chris Hastings unveiled early capabilities at the T3 Technology Conference in New Orleans, with first public production release today.

Panoramix Logo

EAGAN, MN, UNITED STATES, March 19, 2026 /EINPresswire.com/ -- Panoramix, a portfolio management and reporting platform for independent registered investment advisors (RIAs) and independent financial advisors, today announces public availability of Panoramix FacetAI, a new artificial intelligence initiative designed to assist advisors directly within the Panoramix platform. Panoramix CEO Chris Hastings previewed this technology earlier this month at the T3 Technology Conference in New Orleans.

Hastings introduced the initiative and demonstrated early capabilities in a conference session titled “AI as a Teammate, not a Miracle: The Panoramix Approach to Practical AI.”

> “FacetAI assists advisors across navigation and platform workflows, and offers business insights, all supported by our agent framework, secure partner interfaces, and a zero-retention architecture.”
>
> *Chris Hastings, Panoramix CEO*

Building upon Panoramix core functionality including billing, performance reporting, a secure client portal, and a suite of advisor tools, FacetAI introduces a new intelligence layer designed to help advisors navigate the platform, highlight key information, and complete tasks more efficiently.

"FacetAI isn’t a single feature," Hastings said. "It’s a set of capabilities designed to assist advisors across navigation, insights, and platform workflows. That includes tools such as the Help Bot, navigation and workflow assistance, and identifying key insights across billing, performance, and compliance. These capabilities, supported by our agent framework, secure partner interfaces, and a zero-retention architecture designed to protect advisor and client data, make Panoramix more useful for the advisor."

Chris Hastings and Jim Schwieters

AI Built for Advisor Workflows.

FacetAI assists advisors within the Panoramix platform by helping complete tasks, answering questions, and highlighting insights from portfolio and operational data.

Key capabilities include: a Help Bot to answer platform questions and assist with common tasks; Navigation and Workflow Assistance to help advisors move efficiently through platform processes; and Analysis and Insight Surfacing across areas such as billing, performance reporting, and compliance.

Panoramix supports these capabilities through a platform infrastructure including the FacetAI agent framework, secure partner interfaces (MCP), and a zero retention architecture designed to ensure advisor and client data is not stored by AI systems.

As an example, an advisor may activate FacetAI using a customizable wake word and instruct the system to add a note to a client contact. FacetAI opens the appropriate note screen, allowing the advisor to dictate or enter the note through the FacetAI interface, which presents the entry for review before the advisor saves the note.

FacetAI also handles more complex tasks. For example, an advisor reviewing billing could ask FacetAI to compare Mock Billing results to the previous billing period and identify any changes or discrepancies requiring attention.

Hastings said the goal is to position AI as a practical assistant that supports advisors without replacing their judgment.

"Our view is that AI should function like a teammate," Hastings said. "It should help advisors find information faster, highlight useful insights, and streamline workflows while keeping the advisor in control."

Initial Capabilities and Product Roadmap.

The first Panoramix FacetAI capabilities were introduced at the T3 Technology Conference, with additional functionality expected to roll out in phases. Phase one, including the three agents demonstrated, rolls out today, March 19, 2026.

According to the Panoramix FacetAI roadmap, the initiative will expand throughout 2026 through the platform's regular release cycle of approximately 16 updates per year. AI-driven insights are planned to begin in Q2 2026, initially focused on areas such as billing analysis, reporting, and compliance support, with expanded partner interfaces (MCP) expected later in the year.

"Advisors are looking for practical ways AI can help them work more efficiently without adding complexity," said Jim Schwieters, Director of Sales at Panoramix. "FacetAI is designed to support the real tasks advisors perform every day, from simple actions like adding notes to client records to more advanced analysis such as reviewing billing changes between periods."

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 eight years running (2019–2026). For more, see www.panoramixfinancial.com.

Chris Hastings
Panoramix
612-599-8549
email us here
