

Panoramix™ Named a Finalist in the Wealth Management 2026 Industry Awards

"Wealthies" Finalist for Business Support Systems and Artificial Intelligence > Workflow Automation

EAGAN, MN, UNITED STATES, June 9, 2026 /EINPresswire.com/ -- Panoramix earned finalist recognition in two categories of the 2026 Wealth Management Industry Awards (the "Wealthies") for its One Click SEC Audit Survival Solution and Panoramix FacetAI Integrated AI Agents. The company was recognized in the Business Support Systems category for its SEC Audit Survival Solution and in the Artificial Intelligence > Workflow Automation category for FacetAI Integrated AI Agents. Panoramix provides portfolio management, billing, and performance reporting solutions for RIAs and independent financial advisors.



Panoramix Logo

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Panoramix added the SEC Audit automation tool to its suite of advisor tools in December 2025 to help advisors respond to SEC audit requests and data extraction requirements. The tool provides an easy method for extracting the data elements requested in a standard SEC audit initial request in the required format. Advisors simply select the desired month and year and click one button to generate the requested spreadsheet output. “Early users of the SEC Audit feature have reported a high degree of satisfaction,” said Joe Lucking, Director of Operations, “with

Panoramix FacetAI was also named a Wealthies Finalist. FacetAI is built on a flexible AI agent framework designed to support advisor workflows, with its first three agents focused on help,

navigation, and billing. Through this integrated AI assistant framework, advisors can access support, navigate the platform, and execute tasks through voice or keyboard commands. FacetAI was rolled out in the March 19, 2026 release and is included in Panoramix at no additional cost.

“We’re honored to receive this recognition from Wealth Management,” said Chris Hastings, CEO of Panoramix.

“These finalist designations reflect our ongoing investment in practical enhancements that help advisors work more efficiently. Whether simplifying SEC audit preparation or using AI to support everyday workflows, our focus remains on delivering tools that address real operational challenges faced by advisors.”

Now in its 12th year, the Wealth Management Industry Awards — widely known as the “Wealthies” — spotlights the companies and leaders shaping the future of financial advice, wealthtech, investment solutions and advisor growth.

A panel of judges made up of top names in the industry, led by Wealth Management 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 10th.

“The scale and quality of this year’s nominations reflect an industry that continues to evolve at an extraordinary pace,” said David Armstrong, Managing Director of Editorial and Content Strategies for the Wealth Management Group at Informa. “What stood out to our judges was not just product innovation, but the growing sophistication around how firms are helping advisors operate, communicate, personalize advice and build sustainable businesses. The finalists represent a broad cross-section of organizations pushing the industry forward in meaningful ways.”

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



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by informa

2026 Industry Awards Finalist

2026 Wealthies Finalist

About the Wealth Management Industry Awards

The Wealth Management Industry Awards recognize outstanding organizations and individuals supporting financial advisor success through innovation, leadership and service. Produced by the Wealth Management Group at Informa, the program honors achievement across technology, asset management, practice management, client service, marketing, leadership and advisor support.

About Wealth Management

Wealth Management, an Informa business, provides financial professionals with trusted news, research, events, and insights to help them build stronger relationships, improve their practices, and grow their businesses. Through digital media, live events, and industry research, Wealth Management connects the wealth ecosystem at every level.

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