



Release Notes 25.06.

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DOCUMENT VERSION CONTROL

Version	Comments	Author	Date
0.1	Draft Version	Kunaljit Nath	06/05/2025
0.2	Draft Version	Rob Britt	

RACI MATRIX

R - Responsible, A - Accountable, C - Consulted, I - Informed

	Tarun Goud	Rob Britt	Brian Moran
Review	A	A	I
Approve	C	A	A

INTRODUCTION

Release 25.6 focuses on the Wealth Manager 2.0 (WM 2.0) rollout, delivering targeted functional and visual enhancements across Pillar Access Controls, Contact Visibility, Update Behavior, and Carousel Content Display. These changes focus on governance, user clarity, and elevating the collaborative experience between Wealth Manager firms and their internal teams.

This release strengthens content control via new permission layers, improves the discoverability of key contacts, and introduces visual storytelling with pinned update carousels. Additionally, update restrictions are enforced to ensure Pillar content is only added to live, published entities.

IMPACTED USERS

Impacted Persona(s)	Impacted Section	Functionality
WM / WME Admins	Manage Pillars	Ability to assign user-level permissions and designate Pillar Contacts
All Users (with Access)	Pillar Overview	View of Pillar Contacts, visibility into pinned carousel events
WM / WME Admins	Pillars / Updates	Prevent accidental content creation on unpublished Pillars

RELEASE SCOPE DETAILS

The scope of the release includes the following items:

Platform Category	Feature	Description / Details
Pillars	Share Pillar Access	A new "Share Pillar Access" feature is now available under the Manage Pillars section (three-dot menu per Pillar). This allows WM and WME Admins to assign granular access permissions to each employee within the company. Four access levels are supported: Full Access, View and Download, View Only, and No Access. Permissions available are tied to the Admin Panel setup for each user group. A toggle option also allows Admins to mark employees as "Pillar Contacts." The interface supports inline search, a summary note about access, and pagination.

Pillars	Pillar Contacts Panel	On the Pillar Overview page, a “Pillar Contact” section is now visible to users who access the Pillar. This shows up to = contact cards (including name, email, phone, and icons for messaging or profile visits). A “View All” option expands the list. If a user is not from the same company, the contact details remain blurred unless an engagement is established.
Pillars	Pillar Carousel on Company Profile	Updates marked as “Feature in Profile Carousel” (from the Create/Edit Update page) now display in a rotating carousel on the WM company profile. The carousel shows a maximum of 5 updates at a time, following the defined display order. Each update includes an image (if provided), title, description, and redirects to the update’s detail page on click. If more than five are pinned, the oldest one is replaced.
Pillars	Restrict Update on Unpublished Pillars	The “+ Update” button is now hidden for any Pillar that remains in an unpublished state. This prevents users from adding updates to Pillars that are not yet visible or finalized. Once the Pillar is published, the button becomes active. A warning banner is also shown to remind users that changes have been saved but not yet published.}

What’s Next

The following changes are planned for future releases:

Platform Area	Feature	Description
Partner Folders	Folder Permission Alignment	Updated logic for folder creation/removal permissions for both WM and AM companies under the new Edit/View model.
Notifications	Pillar Activity Alerts	In-app alerts for when users are added to Pillars, and for updates or file/document changes.
Emails	Pillar Update Notifications	A templated email is sent when a Pillar update is published with email enabled.

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