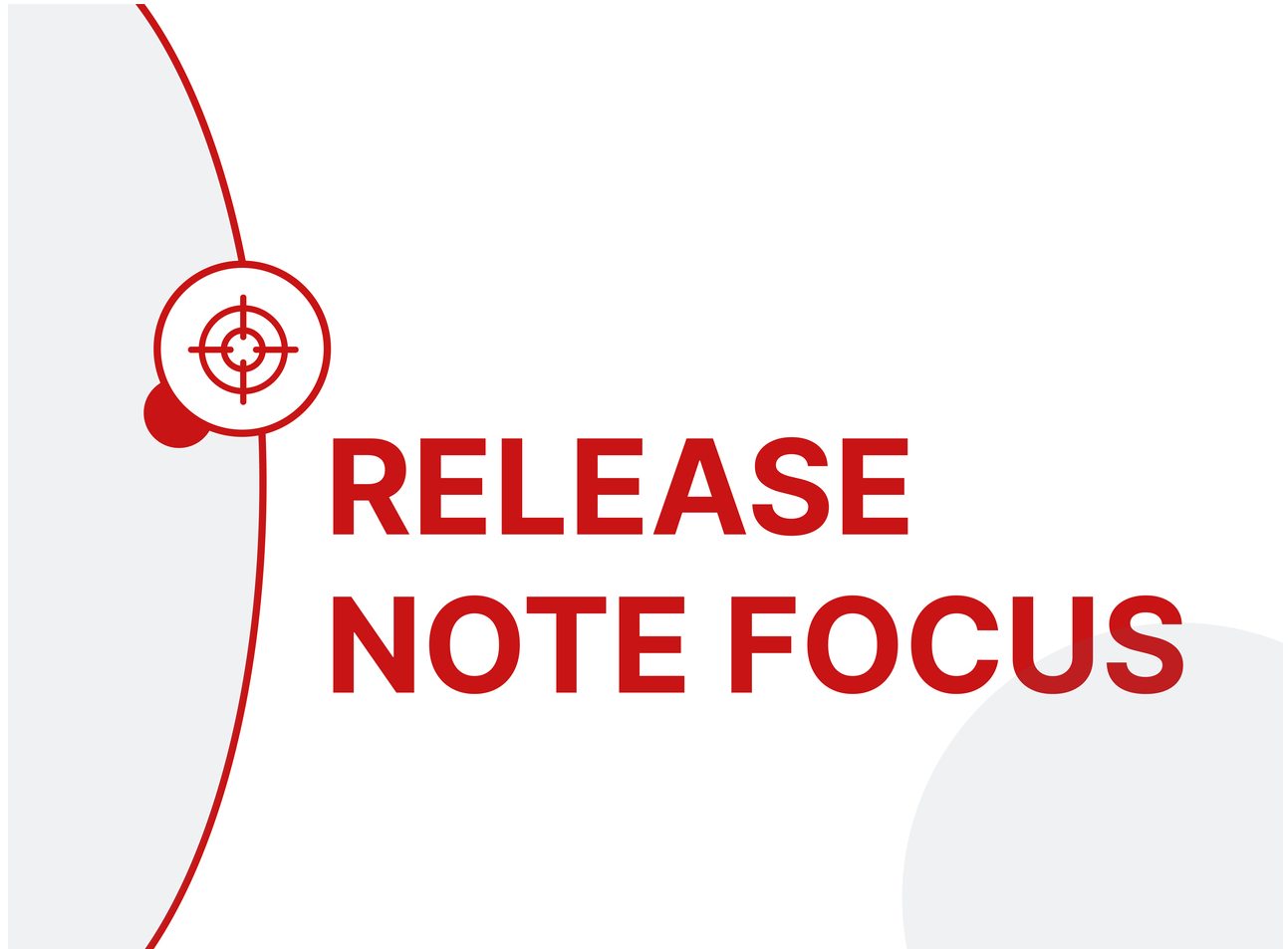


Redtail News

August 2022



Redtail Speak now offers Broadcast Messaging!

We are pleased to announce that one of the top requests of Redtail Speak subscribers is now available on the platform. You now have the ability to send one text message to multiple clients (bulk text messaging) which displays as an individual text message for each recipient.

Along with this capability we have also introduced the feature to bulk invite your contacts to text with you (again, displaying as an individual message for each recipient).

[More info here](#)



Redtail Resources: Account Management



Redtail CRM Client Account Management Resources

Whether you have a portfolio management company or custodian feeding your clients' account data into your Redtail CRM or you manually enter and update your clients' account information, we offer a ton of resources to help you learn everything you need to know about working with accounts in Redtail.

[Learn more](#)

What's new in Integrations?



Quik! combines software and service to give you a fast, easy, robust forms automation

solution. This updated integration between Quik! and Redtail includes the ability to send contacts from Redtail CRM to Quik! A special offer for Redtail users who want to sign up for Quik! is also now available.

[Learn more >](#)



Redtail University Live events are back for 2022!

Get your maps and backpacks ready, trailblazers, because [Redtail University LIVE](#) is once again offering our cross-country, in-person events in 2022! This year, we're celebrating the beauty of our National Parks and using their guiding principles of conservation and growth to teach you about one of the most valuable tools in your office.

You can register now for the Redtail University events below. Registration for future events will open as we get closer to those dates.



Charlotte, NC Registration

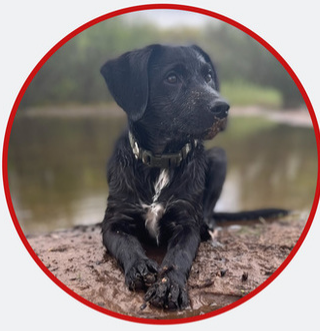


Manage Your CRM

Manage your CRM series: an ongoing Redtail resource

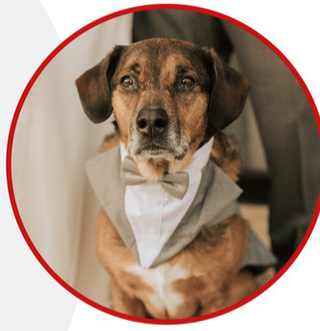
Redtail CRM offers you a ton of opportunities to customize your CRM, both at the individual and at the database level. Read the July 2022 installment of this series now:

[Manage your CRM: Manage Mail Merge Templates](#)



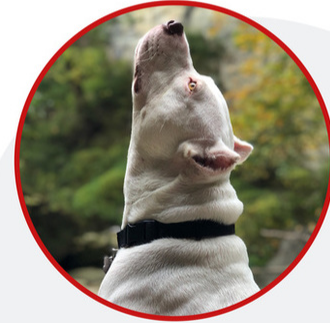
Etta

Megan Dorion
GILFI



Buster

Mariah Newell
Heritage Bank of the Ozarks



Quincy

Karisa Stojkovich
Brunette and Associates

RETAIL
Best Paw Forward
Photo Challenge

Redtail's Best Paw Forward Photo Challenge July winners

Etta, Buster, and Quincy are our July winners and will be featured on your CRM login pages for the month of August! Click below to see the winners and the other contenders from July. [Challenge details available here.](#)

[View winners and all contenders](#)

Upcoming webinars [view all >](#)

How to Handle Client Loyalty - Thursday, August 4, 11:00am Pacific

[Learn more >](#)

Practice Management Takeover with Lacey Shrum: Actions to take your fee process from surviving to thriving - Tuesday, August 9, 10:00am Pacific

[Learn more >](#)

Redtail Essentials: Notes - Thursday, August 11, 11:00am Pacific

[Learn more >](#)

How to Handle New Employees - Thursday, August 18, 11:00am Pacific

[Learn more >](#)

Building Your Tech Stack - Catchlight - Tuesday, August 23, 10:00am Pacific

[Learn more >](#)

Redtail Essentials: Exports - Thursday, August 25, 11:00am Pacific

[Learn more >](#)

Building Your Tech Stack - fpPathfinder - Tuesday, August 30, 10:00am Pacific

[Learn more >](#)

Redtail Speak Overview Demo - Every Monday at 11:00am Pacific

[Learn more >](#)

Redtail CRM Overview Demo - Every Tuesday at 11:00am Pacific

[Learn more >](#)

30 Minute QuickStart - Every Wednesday at 11:00am Pacific

[Learn more >](#)

Our webinars are free to users. Bookmark our [Upcoming Webinar](#) page or follow us on social media to stay up-to-date on our upcoming webinars.

Upcoming conferences

Redtail has representatives available at many industry conferences throughout the year. Check out those we plan to attend in the coming months - we'd love to connect with you if you're in attendance as well.

[View upcoming conferences](#)

Access Redtail CRM anywhere



Stay in touch!

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