

Redtail News

July 2020



Fintechs zero in on Reg BI as deadline arrives

[In this recent *InvestmentNews* piece](#), David Mehlhorn, Redtail's Director of Sales, is one of several Fintech reps who shared their suggestions for advisors looking for ways to use their technology to help with adherence to new Reg BI requirements. You can also read

about [Redtail CRM updates and tools to assist with Reg BI and Form CRS Compliance here](#).

The Path to Independence Promotion

In June we announced that we have teamed up with our friends at RIA in a Box, Riskalyze, and Morningstar to extend support to new registered investment advisors (RIAs) during COVID-19. As a part of the Path to Independence Promotion, participating advisors will be offered complimentary access through the end of 2020 to Morningstar Office Cloud, Redtail CRM, and Riskalyze Elite. [You can learn more about the promotion from RIA in a Box here](#).



The case for texting your

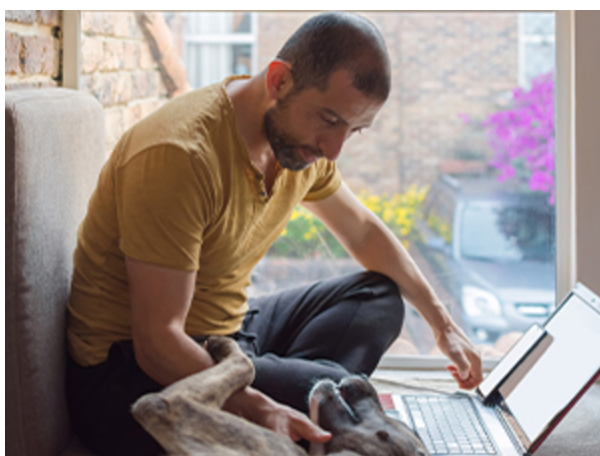
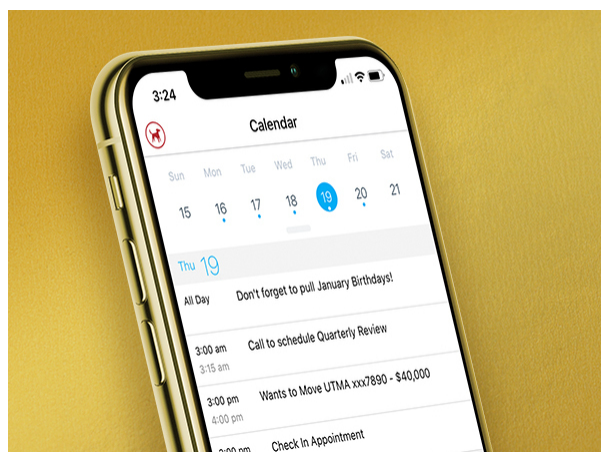


clients just got stronger

Redtail Relationship Manager Dusty Russell had [a piece published in June at Financial Advisor magazine](#) where he lays out how recent challenges advisors have faced have bolstered the case for adding texting as a component of your client communications mix.

Redtail tops RIA in a Box's CRM Category in their annual survey

RIA in a Box's annual survey of over 1,600 RIAs found that "Redtail is by far the dominant leader in the RIA CRM technology category." [You can read more about their survey findings here.](#)



Practical projects for pandemic downtime: develop a communications plan

If we can help you bolster any area of your business through these suggestions, that will be pandemic downtime well spent. [Read Part 2 of this series here.](#)

What's New in the CRM?

June updates included [the ability to "favorite" contacts within your database](#) and [the addition of account-level Form CRS tracking in Redtail](#). You can read more about those and other recent updates to the CRM via our Release Notes [here](#).



What's New in Redtail Mobile?

We're excited to announce that Seminars are now accessible in the Redtail CRM Mobile app, making on-the-go client event management more streamlined than ever before! You can learn more about this update [here](#).



What's New in Integrations?



[GoToConnect](#) features a flexible, affordable VoIP system and professional HD virtual meetings software. Together, these two powerful solutions provide your business the tools to connect whenever, wherever, however. [Learn more about their updated integration with Redtail here.](#)

[LeadTinker](#) believes in leveraging untapped resources to better serve their users. They are able to do this by connecting the advisor's website directly to their most important systems.

[Details on their new integration with Redtail are available here.](#)



LEADTINKER

Upcoming Webinars

[Introducing Redtail Speak!](#): every Monday at 11:00 am Pacific

[Redtail Overview Demos](#): every Tuesday at 11:00 am Pacific

[30 Minute Quick Starts](#): every Wednesday at 11:00 am Pacific

Topical Webinars:

[Redtail Essentials: Documents](#)

Thursday, July 9, 11:00 am Pacific

[Best Practice Partner Webinar - RightCapital](#)

Wednesday, July 15, 11:00 am Pacific

[Calendar Syncing Series - Part 1](#)

Thursday, July 16, 11:00 am Pacific

[Best Practice Partner Webinar - Totum](#)

Tuesday, July 21, 10:00 am Pacific

[Practical Application of Office Procedures through Redtail Workflows](#)

Wednesday, July 22, 10:00 am Pacific

[Calendar Syncing Series - Part 2](#)

Thursday, July 23, 11:00 am Pacific

[Exploring the Mobile App](#)

Thursday, July 30, 11:00 am Pacific

Our webinars are *free* to users. You can see the [full schedule for upcoming webinars here](#) or use our Social links at the bottom of this newsletter to follow us for updates!



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