

Redtail News

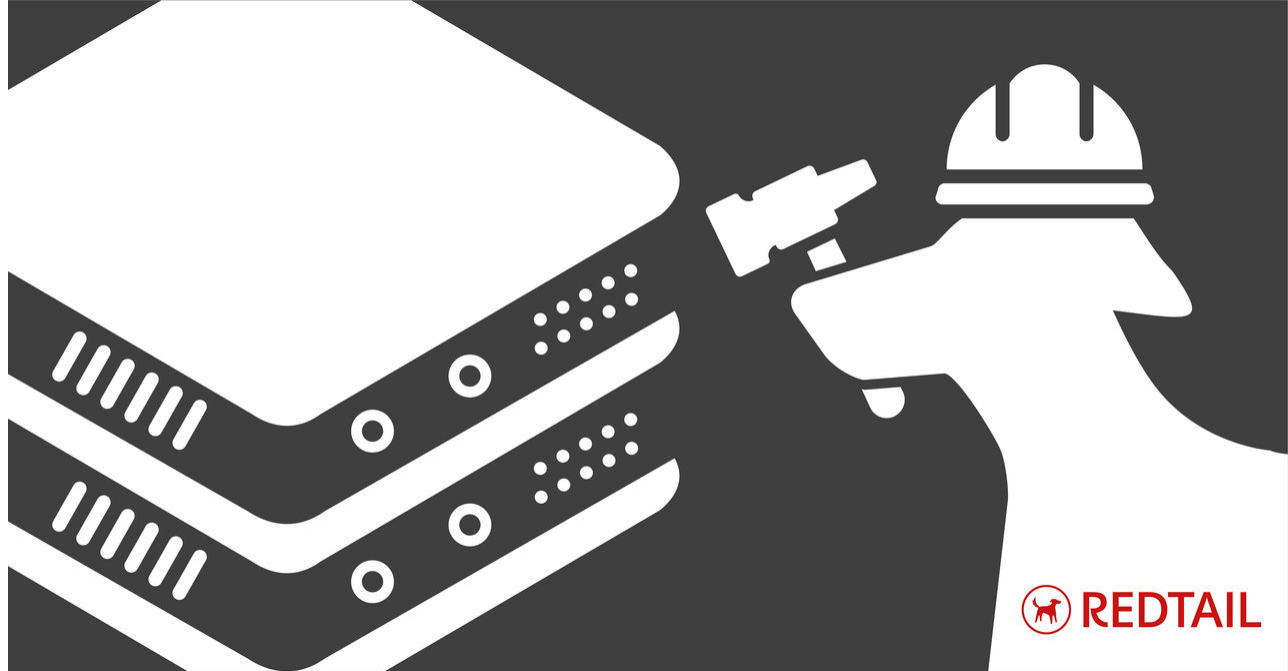
December 2022



Schedule your Speak migration today (if you haven't already done so)

Support for previous versions of Redtail Speak will end on December 15, 2022, by which point all Speak users must be migrated to the new version. To schedule your migration, contact our Sales Team at 800-206-5030 x2 or our Support Team at 800-206-5030 x3.

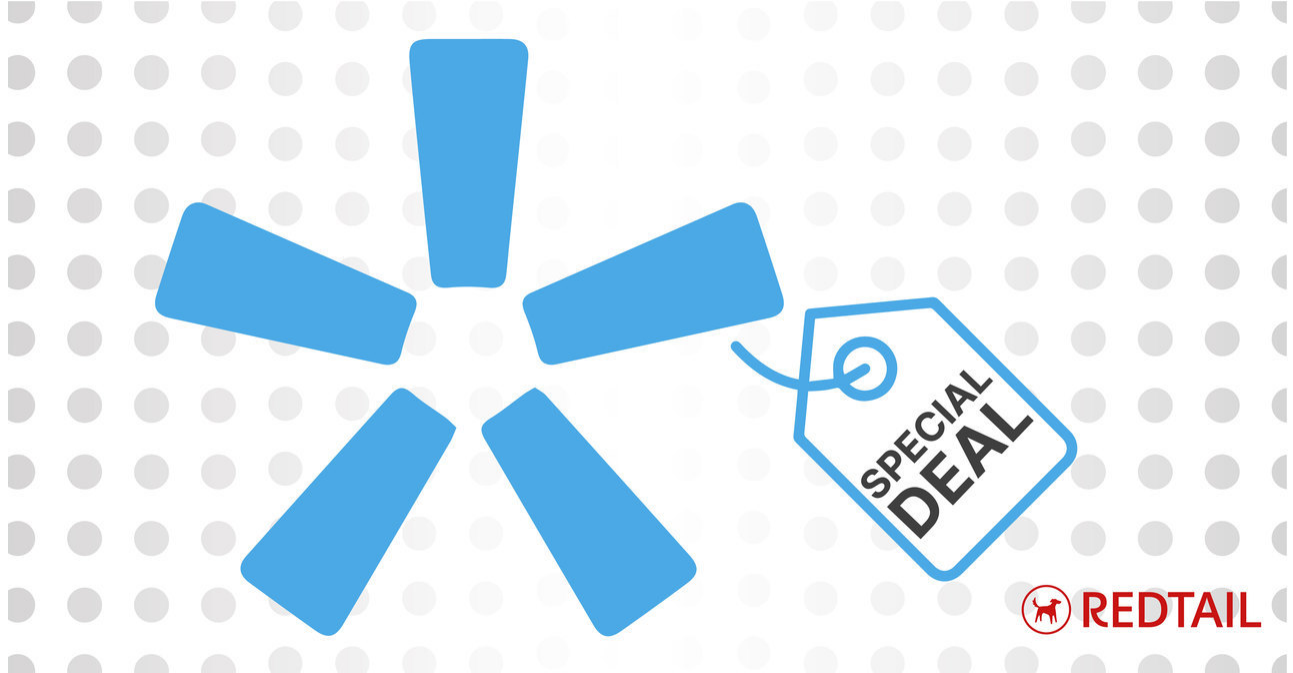
[See our previous communication for details](#)



Three recent video interviews with Brian McLaughlin, Redtail founder and President, Orion Advisor Tech

Brian was featured in three recent interviews with WealthManagement TV and Advisorpedia. You can check out any of these short video interviews at the links below:

- [Brian McLaughlin on Compliant Text Messaging](#)
 - [The Most Important Factors for Advisors in Choosing Their Tech Stacks](#)
 - [Utilizing Social Media for Marketing](#)
-



A special offer only available to new Orion subscribers through the end of the year

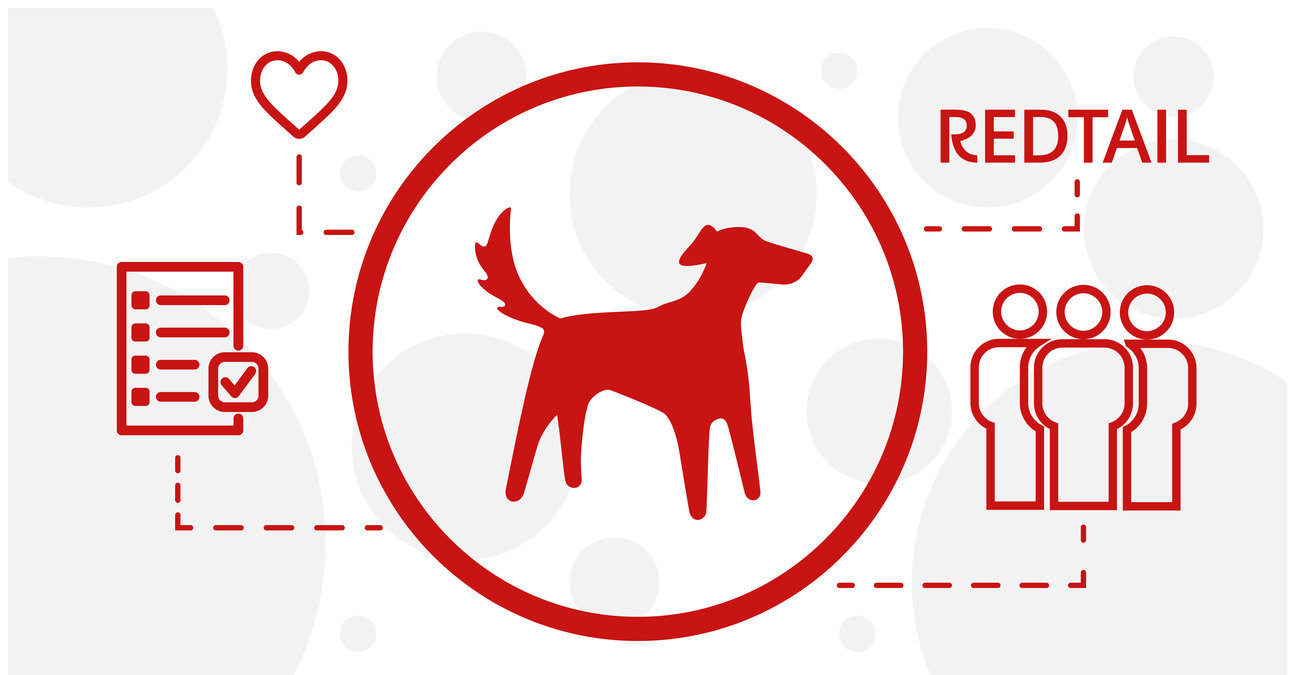
The combination of Redtail's industry-leading CRM technology to Orion's open architecture platform can serve as the foundation of your tech stack, connecting every stage of the advisor-client journey via an end-to-end, seamlessly integrated platform.

[Inquire here](#)



More big Redtail product news coming soon!

We let you know in our November newsletter to look for another huge announcement regarding Redtail's suite of solutions coming in December! You can now expect that news to drop within days!



Your input is invaluable!

You, as a Redtail subscriber, are at the core of everything we do. To ensure

we're delivering the best possible experience for you, we're launching a Net Promoter Score (NPS) survey program to better understand your needs, followed by an action plan for improvement. You may receive an NPS survey email soon from us asking about your experience. We encourage you to fill out the survey and provide candid feedback so we can better support you and your clients.

What's new in Integrations?



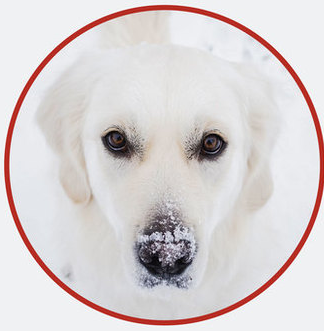
Atlas Point is a Behavioral Science and Analytic platform. Atlas Point's integration with Redtail puts your Financial Virtues™ responses at your fingertips inside the Redtail application.

[Learn more >](#)



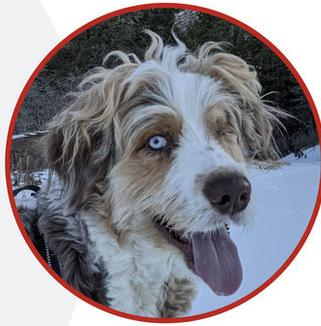
Econiq helps organizations who deliver financial advice run better virtual meetings. Econiq's new integration with Redtail CRM is a real-time integration between Econiq's Flow Meeting platform and Redtail CRM contacts, activities & notes.

[Learn more >](#)



Luna

Anthony Righi
Artisan Capital Management



Finn

Chad Hyllested
Agora Wealth Management



Churchill

Andrew Schmuhl
Olson Wealth Group

RETAIL
Best Paw Forward
Photo Challenge

Redtail's Best Paw Forward Photo Challenge November winners

Luna, Finn, and Churchill are our November winners and will be featured on your CRM login pages for the month of December! Click below to see the winners and the other contenders from November. [Challenge details available here.](#)

[View winners and all contenders](#)

Upcoming webinars [view all >](#)

Redtail CRM Overview - Thursday, December 8, 11:00am Pacific

[Learn more >](#)

Redtail Imaging Overview - Thursday, December 15, 11:00am Pacific

[Learn more >](#)

Redtail Email Overview - Thursday, December 22, 11:00am 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 >](#)

New User Intro - 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!

redtailtechnology.com | 800-206-5030



2315-OAT-11/30/2022



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