

Redtail News

February 2020



Have You Visited Redtail's Website Lately?

If you haven't, we encourage you to visit soon; we've completely revamped it as of January of this year. You can [explore the site](#) to learn more about:

- [Our Support Team](#)
- [Our Welcome Team](#)
- [Redtail Training](#)
- [Redtail University](#)
- [Redtail's history](#)
- [Careers at Redtail](#)
- Much more!

We hope you'll find [the new site](#) fun, informative and worth visiting often; we'll be sharing new information there on a regular basis!

What's New on the Blog?

With our new website rollout, we're placing more emphasis on sharing information relevant to Redtail subscribers [on our blog](#). In addition to



posts on recent Redtail integrations, other posts from the past month included:

- [Redtail CEO Brian McLaughlin's video conversation with Riskalyze CEO Aaron Klein](#),
- an [American Banker story featuring Redtail about the science-backed benefits of dog-friendly work places](#),

- and [an fa-mag.com](#) feature on the author's recent conversations with two marketers named Kim Beck, one being Redtail's Marketing Coordinator and the other Envestnet's Head of Wealth Marketing.
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What's a Redtail Advisor Hero?

In January we kicked off our Advisor Hero campaign, where we hope to be able to shine a bright light on the amazing stories many of the advisors we work with are writing through the services they are performing in their communities and beyond. [Those stories will also be featured on our new website here.](#) So far, we've featured [Dianne Webb](#), [Hannah Tackett](#), and [Bill Simonet](#).

What's New in the CRM?

January updates included AUM permission changes and the ability to apply Activity Templates when creating follow-up activities for Notes, as well as updates and bug fixes in the Custom Exports, Integrations, Opportunities, Preferences, Reporting, Search and Seminars areas of Redtail CRM. You can read more about those and our other recent updates to the CRM via our Release Notes [here](#).



What's New in Integrations?



[Aidentified's MoneyinMotion platform](#)

identifies wealth events across millions of executives within the United States and surfaces these insights through the M2 Platform in real time. You can [find out more about Aidentified and get details on the integration here.](#)

[Infovisa](#) is a leading provider of financial technology solutions delivered to forward-thinking trust, wealth management, and retirement professionals. You can [learn more about Infovisa and their MAUI platform and the integration with Redtail here.](#)





[Timelineapp Tech Limited](#) is the next-gen retirement income software used by financial planners to illustrate, create and manage sustainable withdrawal strategies for their

clients. You can [read more about Timeline and their integration with Redtail here.](#)

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:

[New Partner Spotlight - Timeline App](#)

Wednesday, February 5, 10:00 am Pacific

[Tag Groups vs Keywords vs UDFs](#)

Thursday, February 6, 11:00 am Pacific

[Redtail Essentials: Advanced Search](#)

Thursday, February 13, 11:00 am Pacific

[Exciting Financial Planning Opportunities with the SECURE Act](#)

Wednesday, February 19, 10:00 am Pacific

[How to handle cancelled appointments](#)

Thursday, February 20, 11:00 am Pacific

[Redtail Essentials: Relationships](#)

Thursday, February 27, 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!

Conferences

Representatives from Redtail Technology spend a lot of time on the road at both Broker Dealer Conferences and other industry events. Here's a list of those we'll be attending in the coming months:

[Kestra Conference](#): February 3-5, Scottsdale, AZ

[Capital Choice National Conference](#): February 13-15, Atlanta, GA

[T3 Advisor Conference](#): February 17-20, San Diego, CA

[ProEquities Conference](#): February 24-26, Dallas, TX

[Exemplar Winter Conference](#): February 27-28, Chicago, IL

[AIC Wealth Management and Advanced Solutions Forum](#): March 3-5, Las Vegas, NV

[iPipeline Connections](#): March 15-17, Las Vegas, NV

[ILTCI Conference](#): March 29-April 1, Denver, CO



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