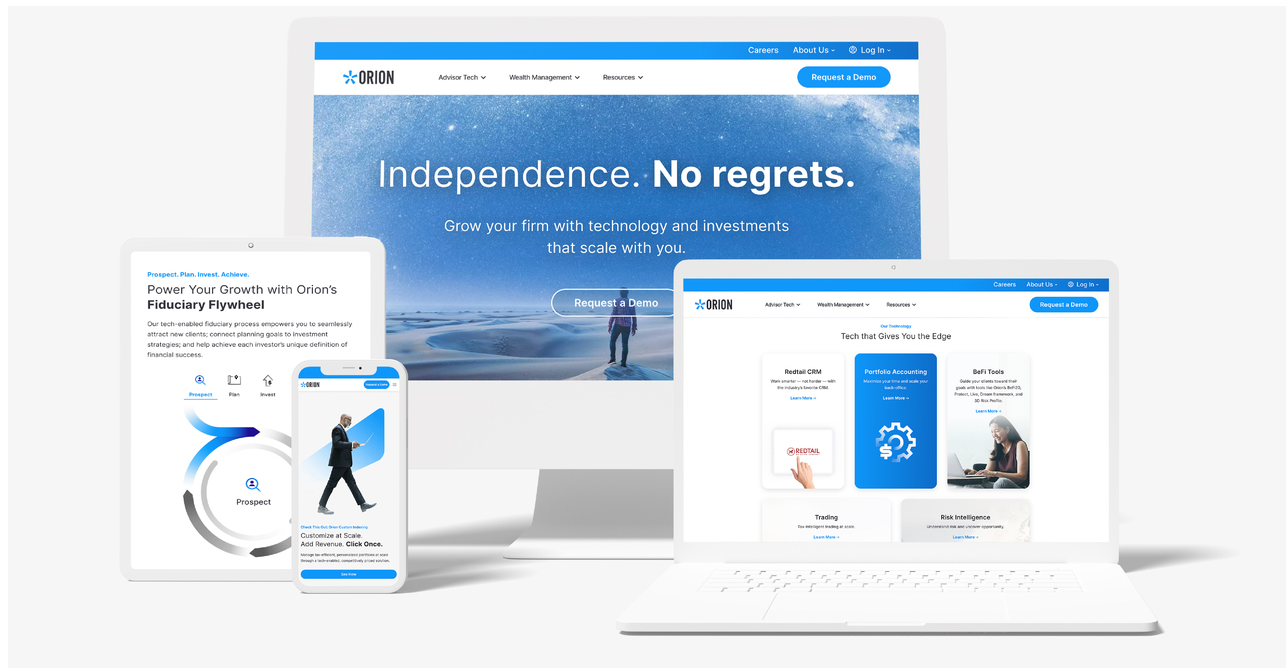




Redtail News

May 2023



Orion launches new website for growth-minded advisors

The new orion.com reflects Orion's identity as the premier provider of the tech-enabled fiduciary process and combines Orion's brand entities — Orion Advisor Tech, Orion Portfolio Solutions, Brinker Capital Investments, Redtail Technology, and TownSquare Capital — to better demonstrate Orion's complete technology and wealth management offering.

[Visit orion.com now](https://orion.com)



REDTAIL UNIVERSITY LIVE

Save the Date!



Redtail Recipes for Success

Redtail University LIVE seats still available

Don't let this educational feast go cold! Seats are still available for these upcoming Redtail University Live stops! Don't miss your chance to learn the best ways to use one of the most essential tools in your office.

Click an event below to secure your seat now for these upcoming locations:

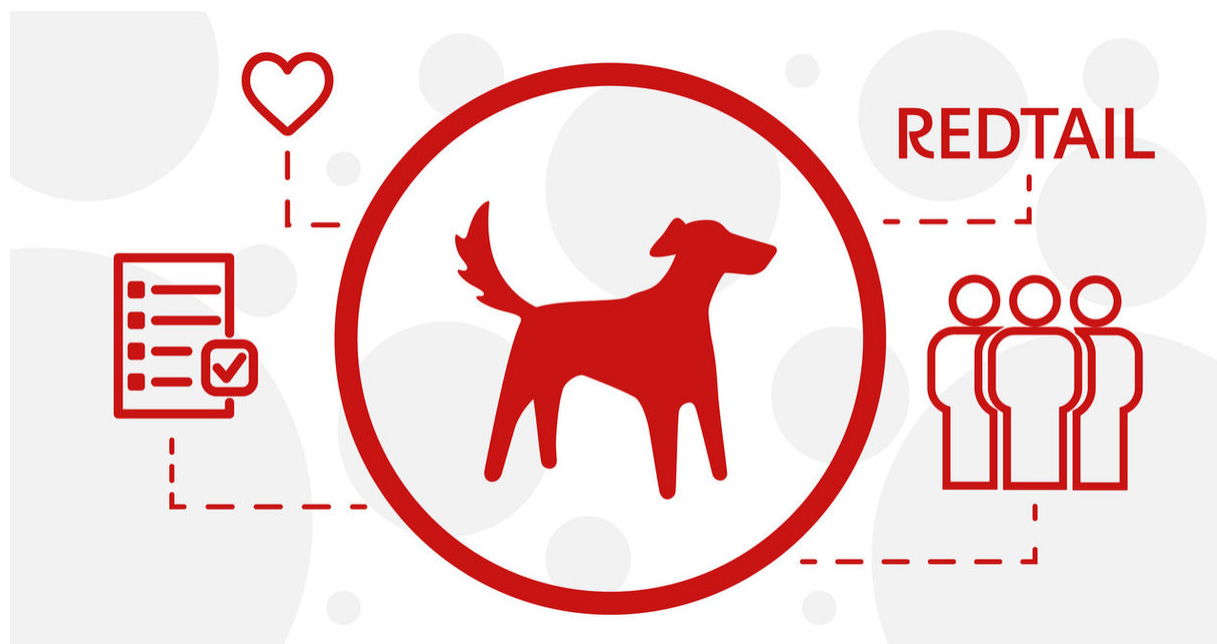


Manage Your CRM

Manage Your CRM Series: Manage Your Database Contact Lists

Redtail CRM offers you many opportunities to customize your CRM, both at the individual and at the database level. Our latest installment in this ongoing series is available now:

Manage Your CRM: Manage Database Contact Lists



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.



Guest Blog Spot

Best Practices from our partners

Two of our integration partners, **TimeLyft** and **Flourish**, provided best practice pieces for our blog this past month. You can visit those posts at the links below:

- [Five ways that time management software increases advisor revenue](#) - by Vito Grammatico, founder and CEO of TimeLyft
- [The benefits of bringing cash into your orbit](#) - by Ben Cruikshank, President of Flourish

Register now for May 16 webinar with Flourish

What's new in integrations?



GReminders helps put an end to no-shows through its automated scheduling and reminder solution for professionals. This updated integration allows you to automatically map answers that your clients submit during scheduling to User Defined Fields (UDFs) in Redtail CRM.

Learn more >



NextGen Bridge, powered by ProtectHeir, is a self-service solution for executors that prevents the risk of estate fraud and deceased identity theft by making it easier for the executor to notify organizations of the passing of a loved one. With this new integration, client information from Redtail pre-populates information in NextGen Bridge at the time of fulfillment, making the job of the client's executor both easier and quicker.

Learn more >



Woody

Robin Weir
Wood Financial Group, LLC



Velma

Lauren Neese
Landaas & Company



Bender

Xavier Stonehouse
Financial Sense Wealth Management

REDTAIL
Best Paw Forward
Photo Challenge

Redtail's Best Paw Forward Photo Challenge April winners

Woody, Velma, and Bender are our April winners and will be featured on your CRM login pages for the month of May! Click below to see the winners and the other contenders from April. [Challenge details available here.](#)

[View winners and all contenders](#)

Upcoming webinars [view all Redtail >](#) [view all Orion >](#)

Using Tech To Build an Audit-Ready Firm - Orion Compliance Demo and Q&A

[Wednesday, May 3, 9:00am Pacific](#)

[Wednesday, May 10, 9:00am Pacific](#)

[Wednesday, May 17, 9:00am Pacific](#)

[Wednesday, May 24, 9:00am Pacific](#)

[Wednesday, May 31, 9:00am Pacific](#)

Orion Stacks Technology Tour

[Thursday, May 4, 9:00am Pacific](#)

[Thursday, May 11, 9:00am Pacific](#)

[Thursday, May 18, 9:00am Pacific](#)

[Thursday, May 25, 9:00am Pacific](#)

How To Handle Employee Departure - Thursday, May 4, 11:00am Pacific

[Learn more >](#)

11 Steps to Audit-Ready: Using Orion Compliance To Prepare for Your Next Exam - Thursday, May 4, 11:00am Pacific

[Learn more >](#)

Understand Risk, Uncover Opportunity - Orion Risk Intelligence Demo and Q&A

[Tuesday, May 9, 9:00am Pacific](#)

[Tuesday, May 16, 9:00am Pacific](#)

[Tuesday, May 23, 9:00am Pacific](#)

[Tuesday, May 30, 9:00am Pacific](#)

Practice Management Takeover with Lacey Shrum - Tuesday, May 9, 10:00am Pacific

[Learn more >](#)

2023 Market Outlook: Wall Street vs. Main Street - Tuesday, May 9, 1:00pm Pacific

[Learn more >](#)

Redtail Essentials: Opportunities - Thursday, May 11, 11:00am Pacific

[Learn more >](#)

Spring of CE Series - Leadership Begins with You - Thursday, May 11, 11:00am Pacific

[Learn more >](#)

Building Your Tech Stack - Flourish - Tuesday, May 16, 10:00am Pacific

[Learn more >](#)

Redtail Essentials: Activities - Thursday, May 18, 11:00am Pacific

[Learn more >](#)

Ask A Trainer - Thursday, May 25, 11:00am Pacific

[Learn more >](#)

Portfolio Recipes: Treading Carefully in 2023 - Balancing Defense and Offense Portfolio Recipe - Thursday, May 25, 12:00pm Pacific

[Learn more >](#)

Building Your Tech Stack - Income Lab - Tuesday, May 30, 10:00am Pacific

[Learn more >](#)

Redtail Campaigns Overview Demo - Every [First](#) and [Last](#) Monday of Month at 11:00am Pacific

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

[Learn more >](#)

Redtail Imaging 2.0 Overview Demo - Every Third Monday of Month 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 Redtail's **Upcoming Webinars** page or follow us on social media to stay up-to-date on our upcoming webinars. [Bookmark Orion's Events page here.](#)

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](#)



Hunger hurts kids every day. Your donation helps feed them.

Today, 1 in 8 kids is at risk of hunger in America. But you can help!

For each one of you who completed our 2022 Annual Survey, we recently donated \$1 to No Kid Hungry, for a total of \$3904 donated. Through No Kid Hungry's investment methods in this work, \$1 can help provide 10 meals for kids - [learn how here](#).

We thank you so much for your participation which allowed us to make this donation, and encourage you if you are inclined to explore No Kid Hungry's mission further and donate to this cause.

[Donate now](#)

More Advisor Resources from Orion

Looking for more ways to grow your business and deepen your advisor-

client relationships? Sign up to stay up-to-date on the newest ways to grow and scale your business from Orion.

Sign up now!

Access Redtail CRM anywhere



Stay in touch!

redtailtechnology.com | 800-206-5030



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1219-OAT-5/1/2023

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