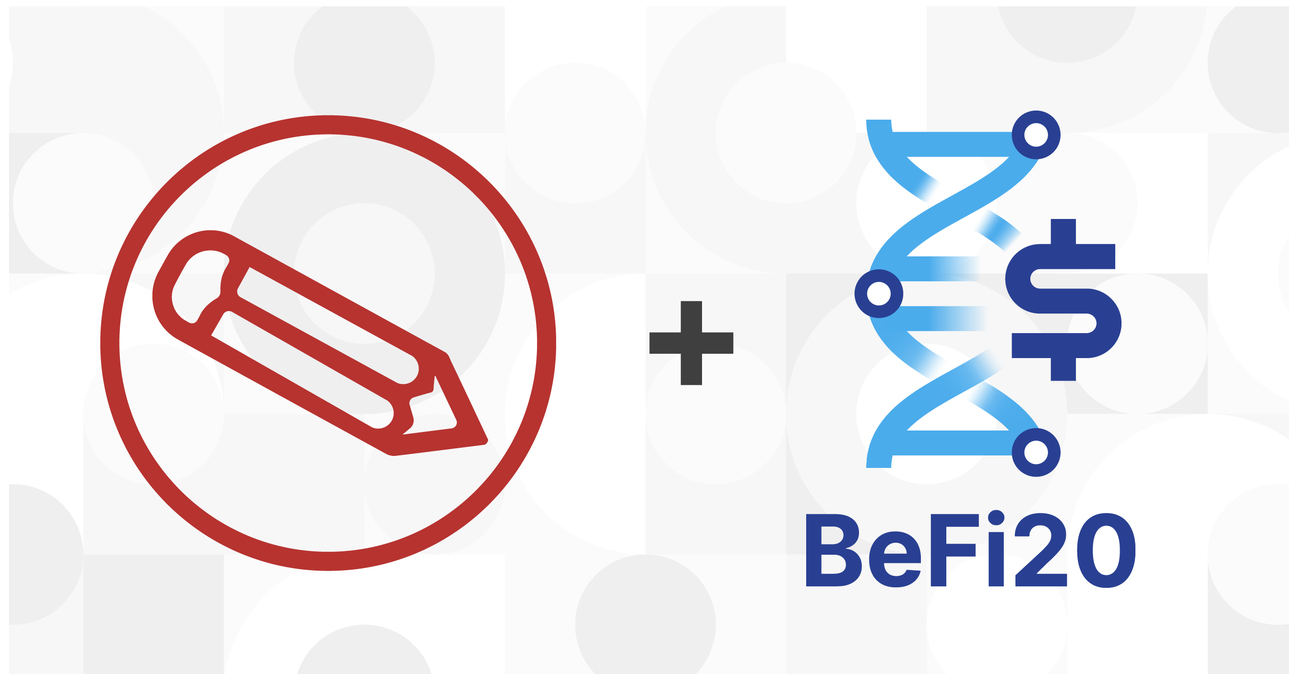


## Redtail News

March 2023



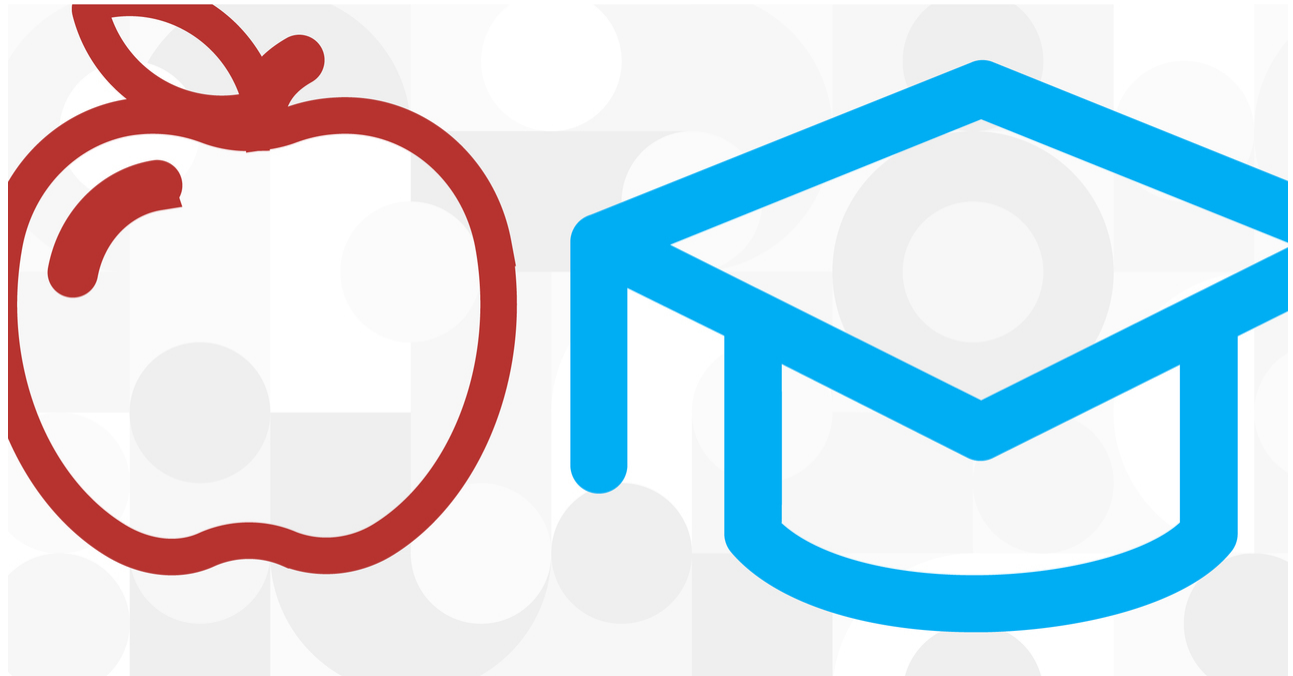
### BeFi20: Available Exclusively through Redtail Campaigns

In addition to providing you with free access to [Orion Planning](#), a subscription to [Redtail Campaigns](#) now also gives you exclusive access to the [BeFi20 tool and content](#) developed by Orion's Chief Behavioral Officer, Dr. Daniel Crosby. You can read two recent interviews with Dr. Crosby about BeFi20 and some of the financial challenges it is designed to help advisors address at the links below:

- [Is Lying About Money Cheating? Most People Say Yes. - from RIA Intel](#)
- [Couples' Money Issues Important Territory for Advisors - from Advisorpedia](#)

"Deepen Client Conversations with Orion's New BeFi20 Tool" webinar registration

[Read press release](#)



## Orion Launches Advisor Academy, a Free On-Demand Learning Platform for Fiduciary Advisors

Also built on the research and insights of Dr. Daniel Crosby, [Orion Advisor Academy](#), now available to advisors, is designed to help you achieve your CE requirements with weekly reporting to CFP and IWI, all at no cost to you. Orion Advisor Academy provides practical education in the four pillars of the [Orion Fiduciary Flywheel](#): Prospect, Plan, Invest, and Achieve.

[Read press release](#)



## ChatGPT coming to Redtail Speak?

News that Orion's engineering team has been exploring the possibility of rolling ChatGPT functionality out to **Redtail Speak** users was one of many big announcements made during the Opening Session of **Orion Ascent 2023** on February 28. Read more of what Orion CEO Eric Clarke revealed about those plans, as well as about other big announcements from that session, at the link below.

[InvestmentNews story here](#)



**Redtail solutions included as part of new Orion Stacks**

[Redtail CRM](#), [Redtail Speak](#), and [Redtail Imaging](#) are now available as components of **Orion Stacks**, which were rolled out on February 23 to provide advisory firms an opportunity to banish siloed tech forever and focus on what matters most — growing and scaling your business.

[Learn more here!](#)

[Register for webinar](#)

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## What's new in Integrations?



[DTS Verify](#) is a subscription service that has partnered with Redtail CRM to allow you to rapidly confirm the identity of a client. This new integration with DTS Verify allows you to easily confirm client identities via codes sent to their preferred number on file in Redtail CRM.

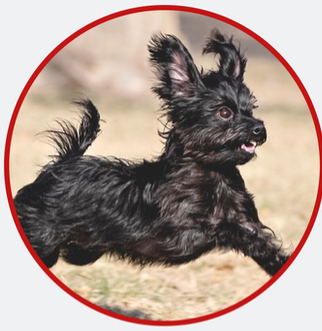
[Learn more >](#)



[Orion Portfolio Solutions](#) is a turnkey asset management program that seamlessly integrates technology that is equal parts intuitive and powerful, with flexible investment options and hands-on product support. This updated integration provides our mutual subscribers the ability to run (or continue work on) a proposal from any current contact in Redtail CRM instead of having to go back to the Orion portal.

[Learn more >](#)

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**Linus**

Regina Rosecrans  
Inspire Advisors



**Quin**

Katie Kilgore  
Innovative Financial Solutions

REDTAIL  
**Best Paw Forward**  
Photo Challenge



**Pups**

Deb & Jeff Swanson  
Parson Financial Associates, Inc

## Redtail's Best Paw Forward Photo Challenge February winners

Linus, Quin, and Chevy Tailgate Pups are our February winners and will be featured on your CRM login pages for the month of March! Click below to see the winners and the other contenders from February. [Challenge details available here.](#)

[View winners and all contenders](#)

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

**Building Your Tech Stack - Quik!** - Tuesday, March 7, 10:00am  
Pacific

[Learn more >](#)

**Orion Technology Demo and Q and A: The Solution That Scales**  
- Thursday, March 9, 9:00am Pacific

[Learn more >](#)

## **Workflow Series – Building Workflow Templates - Thursday,**

March 9, 11:00am Pacific

[Learn more >](#)

## **Deepen Client Conversations with Orion's New BeFi20 Tool**

- Thursday, March 9, 11:00am Pacific

[Learn more >](#)

## **Practice Management Takeover with Kate Guillen - Tuesday,**

March 14, 10:00am Pacific

[Learn more >](#)

## **Workflow Series – Live Application - Thursday, March 16, 11:00am**

Pacific

[Learn more >](#)

## **Introducing Orion Stacks: One Integrated UX. One Agreement.**

**All the Power of Orion.** - Thursday, March 16, 11:00am Pacific

[Learn more >](#)

## **Building Your Tech Stack - Bento Engine - Tuesday, March 21,**

10:00am Pacific

[Learn more >](#)

## **Workflow Series – Enhancing with Automations - Thursday, March**

23, 11:00am Pacific

[Learn more >](#)

## **Redtail Essentials: Advanced Search - Thursday, March 30, 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.

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## 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](#)

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## Access Redtail CRM anywhere



# Stay in touch!

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