

# Redtail News

April 2023



## Stories from the Podcast Booth

Several recent podcast appearances by **Orion Advisor Technology President Brian McLaughlin** and **Orion Advisor Solutions CEO Eric Clarke** provide much insight into the history of both Redtail and Orion as well as into the future they are now mapping out together to enhance and support the advisor experience through technology. Check them out at the links below (or listen in your favorite podcast app):

- **["Brian McLaughlin \(Live at Ascent in Orlando, FL\)"](#)** on *Standard Deviations with Dr. Daniel Crosby*
- **["Eric Clarke: How 'Growing Up' in this Industry Impacted his Life"](#)** on *The Big Reveal*

- ["How People, Culture, and Technology Drive Business Success with Orion's Brian McLaughlin"](#) on Orion's *The Weighing Machine*
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## 2023 T3/Inside Information Advisor Software Survey results

The 2023 T3/Inside Information Advisor Software Survey Results were released in mid-March at the T3 Advisor Conference held in Tampa.

Several highlights:

- **Orion took the top spot in the All-in-One Software category** with the #1 market share, and a 7.73 user rating (a rating of 7.0 or higher equates to a high degree of satisfaction)
- **Redtail held the #1 market share in the CRM category**, with an average user rating of 8.10, landing Redtail CRM among the Software All-Stars
- **In the Portfolio Management/Reporting Tools category, Orion is #1 in market share**, taking the top spot this year, with a user rating of

We understand you have many tech options from which to choose in this space and we are humbled and appreciative once again at the love expressed toward Orion's and Redtail's solutions.

[Read full survey results](#)

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## "ChatGPT Use Will Become an Industry Trend: Brian McLaughlin"

In last month's newsletter, we mentioned Orion CEO Eric Clarke's reveal at **Orion Ascent 2023** that we are exploring ways to incorporate ChatGPT into our Redtail Speak solution. You can read more on what is in the works in regard to this project in a recent interview with Brian McLaughlin, Orion Advisor Technology President, at *ThinkAdvisor*.

[ThinkAdvisor story here](#)

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# Manage Your CRM

## Manage Your CRM Series: Manage Your Database Account 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 Account Lists](#)

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### What's new in Integrations?



**Andes Wealth Technologies** provides an award-winning risk tolerance, Investment Policy Statement and client onboarding solution, infused with behavioral finance to help financial advisors deliver deeply personalized service. This integration allows advisors using Redtail CRM to sync Client and Prospect data to the Andes Platform for a streamlined and efficient process.

[Learn more >](#)



The Financial Advice Journey Starts with **Asset-Map**. Provide a comprehensive advice experience that engages clients from start to finish and empowers them to make better decisions by getting on the same page - literally. This updated integration includes the ability to import and store account and asset/liability data from Redtail CRM into Asset-Map.

**[Learn more >](#)**



**Finpace** offers automation protocol built to reduce effort, relieve stress and increase your productivity. This new integration provides our mutual subscribers the ability to pull client data from Redtail CRM into Finpace as well as to push client data from Finpace into Redtail CRM.

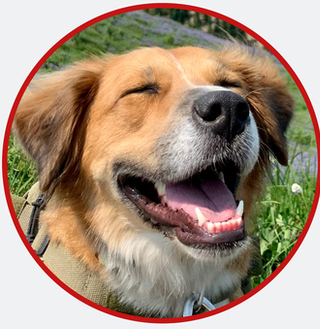
**[Learn more >](#)**



**Flourish** provides innovative access to financial products that help Registered Investment Advisors secure their clients' financial futures. This new integration gives advisors the ability to quickly and easily pre-fill end-client applications and then invite clients with the press of a button within Flourish.

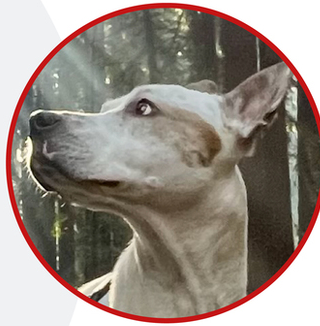
**[Learn more >](#)**

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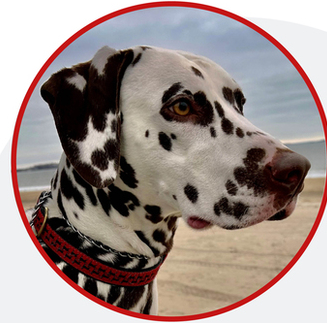
**Mango**

John Parrillo  
Wealth Navigation Advisors



**Niko**

Alyssa Grimes  
Censia Wealth Advisors



**Presley**

James Ellis  
Affinity Investment Group

REDTAIL  
**Best Paw Forward**  
Photo Challenge

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

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

[View winners and all contenders](#)

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

**Orion Risk Intelligence Demo and Q&A** - Tuesday, April 4, 9:00am Pacific

[Learn more >](#)

**Building Your Tech Stack - Mobile Assistant** - Tuesday, April 4, 10:00am Pacific

[Learn more >](#)

**Orion Compliance Demo and Q&A** - Wednesday, April 5, 9:00am

Pacific

[Learn more >](#)

**Your Proposal Generation Process Just Got Better** - Wednesday,

April 5, 11:00am Pacific

[Learn more >](#)

**The Solution That Scales: Orion Technology Demo and Q&A**

- Thursday, April 6, 9:00am Pacific

[Learn more >](#)

**Redtail Essentials: Relationships** - Thursday, April 6, 11:00am

Pacific

[Learn more >](#)

**Practice Management Takeover with Zoë Meggert** - Tuesday, April

11, 10:00am Pacific

[Learn more >](#)

**How To Handle Client Death** - Thursday, April 13, 11:00am Pacific

[Learn more >](#)

**Your Exclusive Look at Orion Stacks** - Thursday, April 13, 11:00am

Pacific

[Learn more >](#)

**Spring of CE Series - The Science of Influence** - Thursday, April

13, 11:00am Pacific

[Learn more >](#)

**Building Your Tech Stack - Finpace** - Tuesday, April 18, 10:00am

Pacific

[Learn more >](#)

**Building Your Tech Stack - Orion** - Tuesday, April 18, 12:00pm

Pacific

[Learn more >](#)

**Redtail Essentials: Accounts** - Thursday, April 20, 11:00am Pacific

[Learn more >](#)

**Building Your Tech Stack - Holistiplan** - Tuesday, April 25, 10:00am

Pacific

[Learn more >](#)

**Segmenting Your Client Data** - Thursday, April 27, 11:00am 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 our [Upcoming Webinars](#) 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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## 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!](#)

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## Access Redtail CRM anywhere



## Stay in touch!

[redtailtechnology.com](https://redtailtechnology.com) | 800-206-5030



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