



June 2019

Digital Advisor Recruitment Platform FA Match Launches Alliance with Industry Heavyweights



“FA Match is revolutionizing how we seek and develop human capital, which is incredibly important in our people-driven industry. Joining this movement is a no-brainer and we’re proud to be a part of it.” ~Redtail CEO, Brian McLaughlin

The FA Match Alliance’s mission is to bring together innovators and game-changers from all corners of the industry to help drive connectivity between firms seeking top advisor talent, and advisors looking to take control of their career paths. You can read more about the FA Match Alliance [here](#).

Our own Rick Williamson will interview Ryan Shanks, co-founder and CEO of FA Match, about how to create an “Active” recruitment strategy to ensure firms and advisors make meaningful connections that impact their bottom line in our [Practice Management Spotlight webinar with FA Match on June 18](#).



Customer Spotlight: Heron Wealth

“The day I realized I had eight full pages of to-do items, but no control and no visibility into my team members’ work, was the day I realized we had to get a top-notch Client Relationship Management (CRM) program.

We did a four-month detailed review of all available options. We chose Redtail CRM and Redtail Email during our search for the right platform, because the user design is streamlined,

minimalistic and intuitive. Adopting Redtail enabled us to maintain break-neck growth and provide better service for our clients, all while holding the line on adding support and operations personnel.” ~David Edwards, President and Founder of Heron Wealth

[You can check out our full Customer Spotlight on Heron Wealth here.](#)

What's New in the CRM?

Our latest round of updates includes new Deleted Activity and Deleted Account Reports, new bulk capabilities from the Accounts by Contact Report, and the ability to link a note to more than one contact. You can read more about those and our other recent updates to the CRM via our Release Notes [here](#).

What's New in Integration?

[AssetMark's](#) advanced technology makes managing client accounts and complex portfolios more efficient, so advisors can spend more time with clients. Details for their integration with Redtail are available [here](#).



The [Quik! Forms App](#) is a software-as-a-service (SaaS) platform for generating, prefilling, signing or printing forms to PDF using an organization's own data. Quik!'s updated integration with Redtail CRM allows our mutual subscribers to pull contact data from Redtail CRM directly into the forms they are working with in the Quik! Forms App. Details for this integration with Redtail are available [here](#).



2019 Redtail Universities!

Boston and Minneapolis RTUs are open for registration—you can click their respective icons below to begin the registration process now. [Check our website to learn about RTU and see our full schedule for 2019.](#)

Also, you can check out and subscribe to our Training Team's YouTube channel [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 - Anvil](#)

Tuesday, June 4, 11:00 am Pacific

[Prepping for Client Reviews](#)

Thursday, June 6, 11:00 am Pacific

[Redtail Essentials: Workflows](#)

Thursday, June 13, 11:00 am Pacific

[Practice Management Spotlight with FA Match](#)

Tuesday, June 18, 11:00 am Pacific

[How your CRM can help you Manage Client Deaths](#)

Thursday, June 20, 11:00 am Pacific

[Redtail Essentials: Automations](#)

Thursday, June 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:

[ESI Conference](#): June 3-7, Asheville, NC

[United Planners Conference](#): June 4-6, Glendale, AZ

[Ladenburg West Coast Conference](#): June 5-8, Seattle, WA

[Calton National Sales Conference](#): June 6-8, Orlando, FL

[Waddell and Reed Circle of Champions](#): June 6-9, Atlanta, GA

[Hilltop Securities Education Conference](#): June 9-11, Dallas, TX

[AICPA Engage](#): June 9-13, Las Vegas, NV

[Pershing INSITE](#): June 12-14, Phoenix, AZ

[Insurance Technologies Client Conference](#): June 23-25, Denver, CO

[Fidelity Inside Track](#): June 25-26, San Francisco, CA

[1st Global Communities](#): July 21-23, Frisco, TX

[Cetera Connect Conference](#): July 22-25, Denver, CO

[Loring Ward Advisor Symposium](#): July 28-30, Austin, TX

[T3 Tech Summit](#): July 29-30, St. Louis, MO



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