

Redtail News

January 2023



12 Redtail Highlights from the Past 12 Months

We hope your 2023 has kicked off with a fantastic start! Here at Redtail we are all excited to dive into the new year to see what it will bring. In case you missed it though, we did recently take a look back at perhaps the most eventful year in Redtail's nearly 20 years of operations. The highlights include new product announcements, our acquisition by Orion, multiple solution updates, new integrations, and more news that may be valuable to your day-to-day operations.

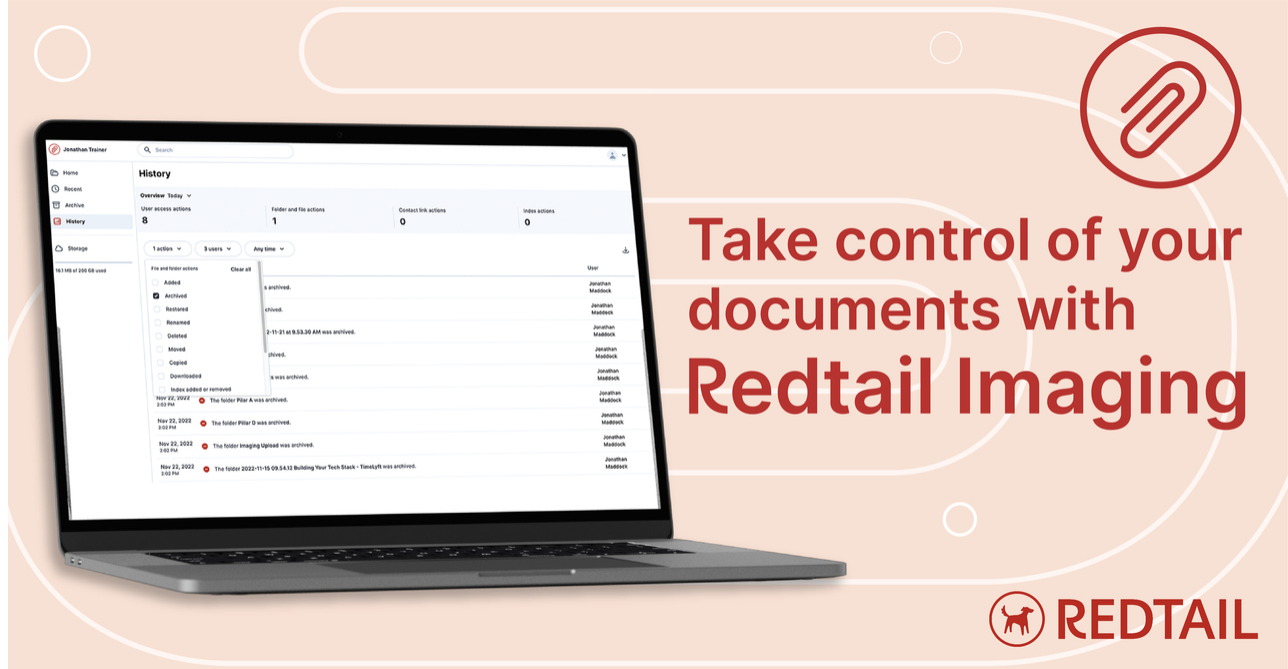
[Read it now](#)



Brian McLaughlin, Redtail founder and President, Orion Advisor Tech, included in *23 people who will leave a mark on wealth management in 2023* list

Financial Planning including Brian on their annual list of people they believe will make news in the coming year lines up with our expectations here. That's but one of the many reasons we're excited about working here at Redtail and serving the advisor community.

[See the full list](#)



Take control of your documents with Redtail Imaging

Redtail's New Imaging Solution was rolled out in December!

If you've been considering going paperless and moving to an electronic document storage solution, there's never been a better time to give Redtail Imaging a look. We released a brand new version of our electronic document storage solution in December, with a modern, overhauled user interface, new licensing structures with increased storage limits, and much more!

[Learn more about Imaging](#)

What's new in Integrations?



Moxo powers client interaction workflows across a diverse set of industries. The Moxo integration allows you to easily log all the activity taking place with your clients on Moxo's Digital Interaction Platform directly to your Redtail CRM.

[Learn more >](#)



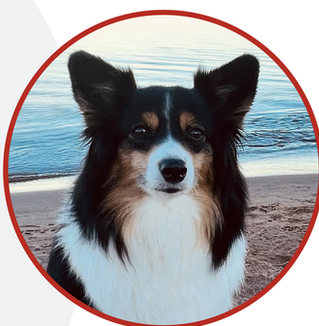
Orion Portfolio Solutions is a turnkey asset management program that seamlessly integrates technology that is equal parts intuitive and powerful, with flexible investment options and hands-on product support. This new integration provides our mutual subscribers the ability to create a new proposal or open a new account in Orion Portfolio Solutions from within Redtail CRM.

[Learn more >](#)



A Litter of Goldens

Ashleigh Roberds
Fairhaven Financial
Advisory Corporation



Aela

Christine Miller
North Oaks
Financial Services

REDTAIL
Best Paw Forward
Photo Challenge



Doug & Russel

Alaina Harrington
Bravera Wealth

Redtail's Best Paw Forward Photo Challenge December winners

A Litter of Goldens, Aela, and Doug & Russel are our December winners and will be featured on your CRM login pages for the month of January! Click below to see the winners and the other contenders from December.

[Challenge details available here.](#)

Upcoming webinars [view all >](#)

How To Tackle Data Cleanup - Thursday, January 5, 11:00am Pacific

[Learn more >](#)

Practice Management Takeover with Stephanie Dannebaum

- Tuesday, January 10, 10:00am Pacific

[Learn more >](#)

Redtail Essentials: Manage Your Account - Thursday, January 12,

11:00am Pacific

[Learn more >](#)

Building Your Tech Stack - GReminders - Tuesday, January 17,

10:00am Pacific

[Learn more >](#)

Tour of the Contact Record - Thursday, January 19, 11:00am Pacific

[Learn more >](#)

Building Your Tech Stack - TIFIN Wealth - Tuesday, January 24,

10:00am Pacific

[Learn more >](#)

Redtail Essentials: Today Page - Thursday, January 26, 11:00am

Pacific

[Learn more >](#)

How to Prepare for Client Reviews - Thursday, February 2, 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.

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](#)

Access Redtail CRM anywhere



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