



WHAT'S NEW {S} LETTER

Redtail in the News

What Your High-Net-Worth Clients Want to Talk to You About

Last month Redtail CEO Brian McLaughlin provided commentary over at ThinkAdvisor about the five topics that wealthy clients wish they were talking more about with their advisors.



What's New in the CRM?

You can check out some of our recent work and updates to the CRM via the latest Release Notes Bulletin, or see all of our Release Notes here.



2019 Redtail Universities!

We recently announced our Redtail University 2019 cities and dates, kicking off in L.A. on February 26th. This is gonna be fun! And back by popular demand, RTU XL will be happening in Dallas in March. You can sign up for that as well.

Check our website to learn about RTU and see our 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:

- Best Practice Partner Webinar: AdvisoryWorld: Wednesday, January 9, 1:00 pm Pacific
- Redtail Essentials: Manage Your Account / Database Lists: Thursday, January 10, 11:00 am Pacific
- Redtail Essentials: Exports: Thursday, January 17, 11:00 am Pacific
- Best Practice Partner Webinar: RightCapital: Wednesday, January 23, 11:00 am Pacific
- Touring the Contact Record: What Fields are Most Important: Thursday, January 24, 11:00 am Pacific
- Redtail Essentials: Today Page: Thursday, January 31, 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:

- FSI OneVoice: January 28-30, New Orleans, LA
- T3 Advisor Summit: January 29-February 1, Dallas, TX
- TD National LINC: February 6-9, San Diego, CA
- Capital Choice National Conference: February 14-16, Atlanta, GA
- Kestra Conference: February 26, Salt Lake City, UT



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