



MAY 2019

Introducing a new way to sync your Redtail data with Office 365!

If you missed the announcement on April 10, Redtail CRM subscribers now have true two-way sync capabilities between Redtail and Office 365. This will allow Redtail users to sync both contacts and activities bi-directionally between the two platforms.



All the details that you should need in order to get started can be found [here](#), where you'll find instructions for setting up the process as well as information about what is included in the sync for both contacts and activities. We have also posted a FAQ page for Retriever Cloud [here](#).

Also, good news for those of you using hosted Microsoft Exchange (Exchange Online or a hybrid deployment)— [Retriever Cloud will allow you to sync in those situations as well](#).



Oranj's May After-Hours Fundraiser and Cocktail Event

A Leg To Stand On (ALTSO) provides free life-changing prosthetic limbs, orthotic braces, and appropriately fitted wheelchairs to children with untreated limb disabilities in the developing world - at an average cost of only \$250 per child. We are proud sponsors of Oranj's after-hours cocktail event in support of ALTSO on May 8,

2019, from 6:00–9:00pm CDT at Oranj headquarters in Chicago, IL. You can learn more and register for the event [here](#).

What's New in the CRM?

You can check out some of our recent work and updates to the CRM via our Release Notes [here](#).

What's New in Integration?

Real Wealth® Marketing's self-described mission is to educate, inspire and motivate Americans and their families to work with their team of professional advisors to create and implement strategies to achieve both business and personal financial, retirement, estate, philanthropic and legacy goals. Details for their integration with Redtail are available [here](#).



2019 Redtail Universities!

Denver and Boston 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:

[Day-to-Day Habits - Using Redtail CRM Daily](#)

Thursday, May 9, 11:00 am Pacific

[Top 5 CRM Functions you may be Ignoring \(presented with SEI\)](#)

Monday, May 13, 1:00 pm Pacific

[Best Practice Partner Webinar: Mobile Assistant](#)

Tuesday, May 14, 11:00 am Pacific

[Redtail Essentials - Activities](#)

Thursday, May 16, 11:00 am Pacific

[Redtail Essentials - Calendar](#)

Thursday, May 23, 11:00 am Pacific

[Best Practice Partner Webinar: Riskalyze](#)

Tuesday, May 28, 11:00 am Pacific

[Front End Work - Cleaning up Bad History](#)

Thursday, May 30, 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:

Morningstar Investment: May 8-10, Chicago, IL

Peak Excell: May 8-10, Chicago, IL

InvestmentNews RIS: May 14-15, Chicago, IL

Mid Atlantic National Conference: May 14-16, San Jose del Cabo, Mexico

Capital Investment Companies: May 16-18, Myrtle Beach, SC

TradePMR Synergy Conference: May 22-24, Palm Beach, FL

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

Fidelity Inside Track: June 25-26, San Francisco, CA



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