

Redtail News

September 2021



Redtail again tops RIA in a Box's CRM Category in annual survey

RIA in a Box's 2021 technology survey results were recently posted, and Redtail CRM had a very strong showing in what RIA in a Box deems the "most popular technology solution" category.

We are always thrilled to be recognized as a leader in this industry and humbled by the trust Redtail subscribers place in us; our efforts will continue to try to reward that trust with solutions that improve your day-to-day business operations.

[See survey results here](#)



Redtail's Best Paw Forward Photo Challenge August winners

Tessie, Charlie, and Max squared off against ferocious competition in August but emerged victorious and will be featured in our assortment of CRM login pages for the month of September! Click below to see the winners and the other contenders from August. [Challenge details available here.](#)

[View winners and all contenders](#)



In January 2020 we kicked off our [Advisor Hero campaign](#), and we have loved learning their stories and getting to know each of these advisors better through the process. You can [nominate new Advisor Hero candidates here](#).

Read about our latest hero, Sheldon Sweeney, here



Manage your CRM series: an ongoing Redtail resource

Redtail CRM offers you a ton of opportunities to customize your CRM, both at the individual and at the database level. Read the August 2021 installment of this series now:

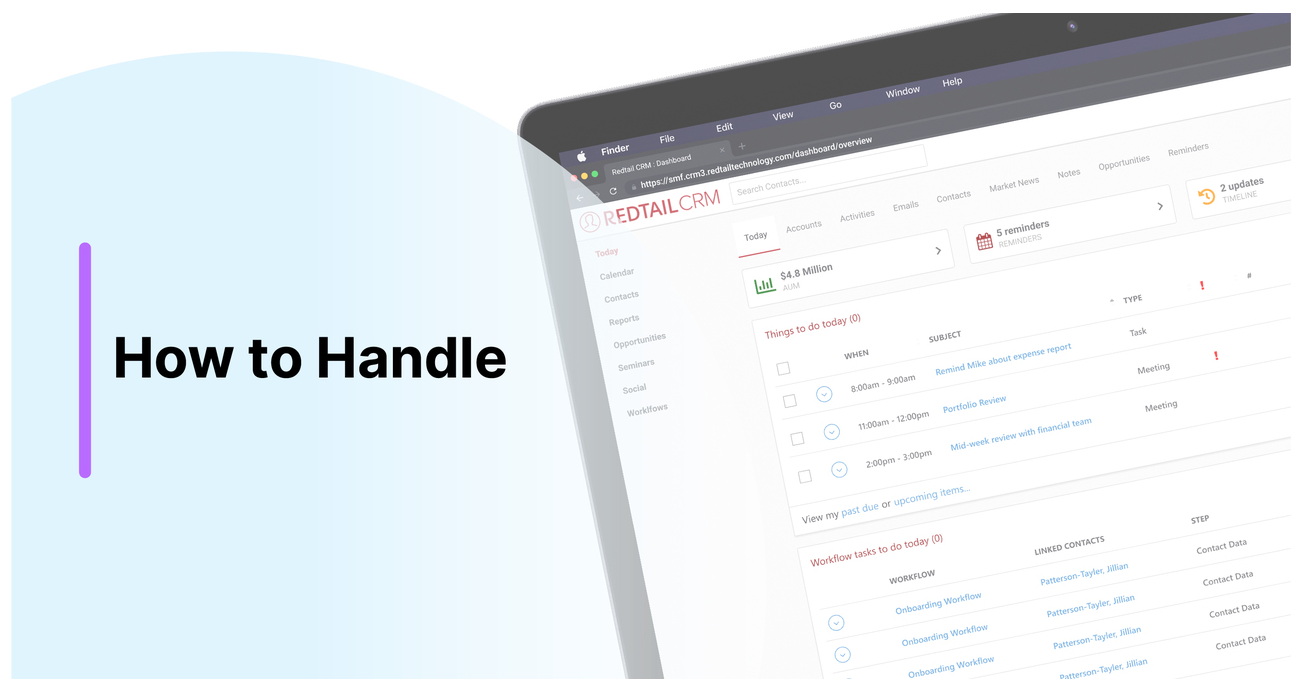
[How to customize your Notification Options preferences](#)

What's new in Integrations?

YCHARTS

YCharts now has a Single Sign-On (SSO) option available from within Redtail CRM. Expect more to come from the integration with this investment research partner in the future.

[Learn more >](#)



Tips from Redtail's Training Team: How to Handle...

Redtail's Training Team puts together these "How to Handle" posts in order to make you aware of some of the ways you might use Redtail CRM to assist with processes, events, etc., that are likely to come up for most offices at one point or another.

[Read "How to Handle RMDs" now!](#)

[Read "How to Handle Client Loyalty" now!](#)

Upcoming webinars [view all >](#)

New Partner Spotlight - PlantechHub - Wednesday, September 8,
10:00am Pacific

[Learn more >](#)

Redtail Essentials: Exports - Thursday, September 9, 11:00am Pacific

[Learn more >](#)

Delivering Digital Planning Experiences: Tech Best Practices

- Thursday, September 9, 1:00pm Pacific

[Learn more >](#)

Practice Management Takeover with Adam Cmejla, founder of Integrated Planning & Wealth Management - Tuesday, September

14, 10:00am Pacific

[Learn more >](#)

How to Handle Multiple Rep Codes - Thursday, September 16,

11:00am Pacific

[Learn more >](#)

Best Practice Partner Spotlight: fpPathfinder - Tuesday,

September 21, 10:00am Pacific

[Learn more >](#)

Redtail Essentials: Broadcast Email - Thursday, September 23,

11:00am Pacific

[Learn more >](#)

Trainer Chat with Redtail DevOps - Thursday, September 30,

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 >](#)

30 Minute QuickStart - 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 (either virtually or in-person) - we'd love to connect with you if you're in attendance as well.

[See our conference schedule](#)

Access Redtail CRM anywhere



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