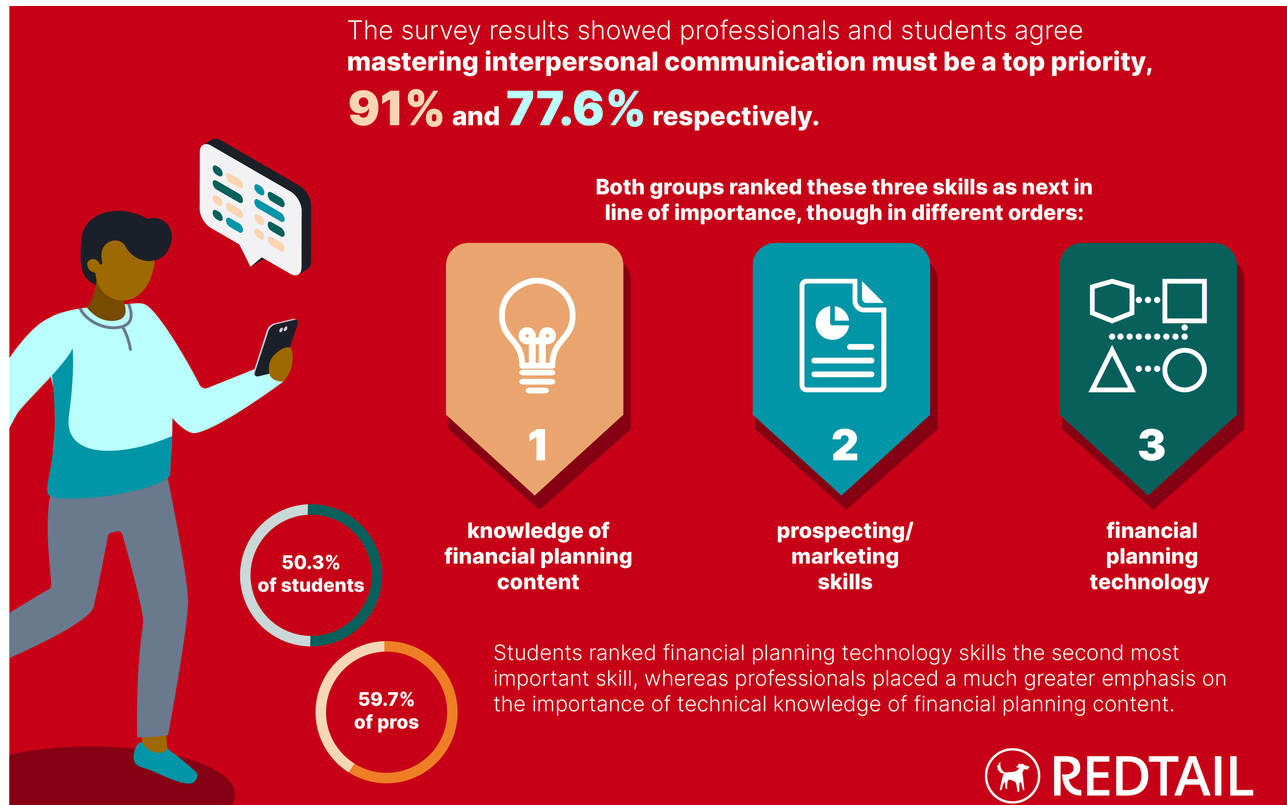


## Redtail News

April 2022



## Redtail's Financial Planning Career Perceptions 2021 Survey Results Are In

In October of 2021, Redtail Technology conducted its “Financial Planning Career Perceptions 2021” survey in conjunction with Brigham Young University-Idaho to learn more about the views of industry professionals and financial planning students regarding career preparation and expectations. Click below to read an Executive Summary of the survey results.

[Read it now!](#)



# RELEASE NOTE FOCUS

**Note templates and follow-up activities are now available in Redtail Mobile!**

Just as in the desktop version of Redtail CRM, when creating notes from within Redtail Mobile you can now kick the process off with one of your previously established note templates. Additionally, you now have the ability to create follow-up activities during the note creation process on Redtail Mobile.

[Learn more](#)

**REDTAIL UNIVERSITY LIVE  
2022**



# Redtail University Live events are back for 2022!

Get your maps and backpacks ready, trailblazers, because **Redtail University LIVE** is once again offering our cross-country, in-person events in 2022! This year, we're celebrating the beauty of our National Parks and using their guiding principles of conservation and growth to teach you about one of the most valuable tools in your office.

You can register now for the Redtail University events below. Registration for future events will open as we get closer to those dates.



[Portland, OR Registration](#)



[Denver, CO Registration](#)

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# Manage Your CRM

## 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 March 2022 installment of this series now:

[Manage your CRM: Manage Broadcast Emails and Email Templates](#)

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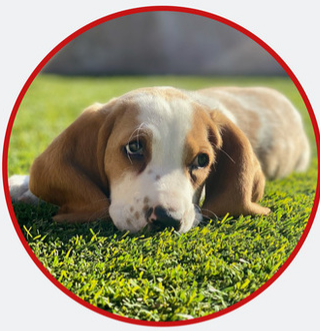
## What's new in Integrations?



**Pulse360** offers automation software to help you serve more clients and not get backlogged. This updated integration between Pulse360 and Redtail includes the ability to view and access your Handwritten Notes from Pulse360 within Redtail CRM.

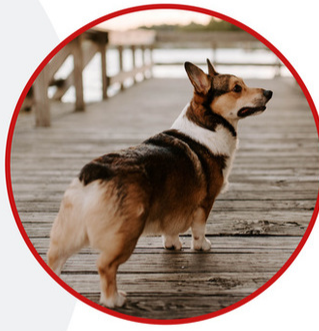
[\*\*Learn more >\*\*](#)

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**Miles**

Lucy Curiel  
Challenger Wealth Management



**Georgie**

Katie Chastain  
Chastain Financial



**Beau**

Kayla Kobelin  
Ascent Capital

REDTAIL  
**Best Paw Forward**  
Photo Challenge

## Redtail's Best Paw Forward Photo Challenge March winners

Miles, Georgie, and Beau are our March winners and will be featured on your CRM login pages for the month of April! Click below to see the winners and the other contenders from March. [Challenge details available here.](#)

[View winners and all contenders](#)

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### Upcoming webinars [view all >](#)

**Building Your Tech Stack - Hubly** - Tuesday, April 5, 10:00am Pacific

[Learn more >](#)

**Redtail Essentials: Relationships** - Thursday, April 7, 11:00am

Pacific

[Learn more >](#)

## **Practice Management Takeover Tuesday with Zoë Meggert**

- Tuesday, April 12, 10:00am Pacific

[Learn more >](#)

## **How to Prepare for Wealth Transfer** - Thursday, April 14, 11:00am

Pacific

[Learn more >](#)

## **Automate appointment reminders and reduce no-shows with Redtail CRM and AppointmentReminder.com** - Tuesday, April 19,

10:00am Pacific

[Learn more >](#)

## **Redtail Essentials: Accounts** - Thursday, April 21, 11:00am Pacific

[Learn more >](#)

## **Ask a Trainer!** - Thursday, April 28, 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.

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# 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.

[View upcoming conferences](#)

## Access Redtail CRM anywhere



## Stay in touch!

[redtailtechnology.com](https://redtailtechnology.com) | 800-206-5030



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