

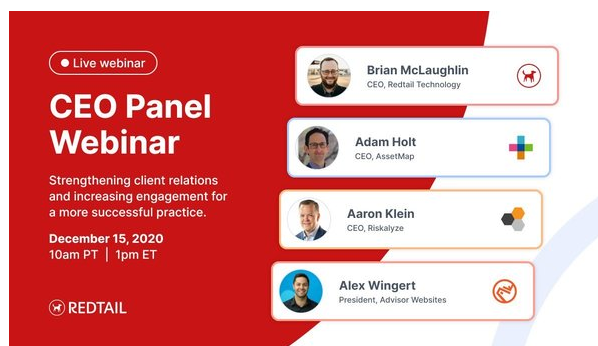
Redtail News



January 2021

Strengthening Client Relations and Increasing Engagement For A More Successful Practice

On December 15th, Redtail CEO Brian McLaughlin joined a CEO panel webinar “for an educational discussion on how to strengthen your client relationships and engage with your audience throughout this transition” to a virtual practice. [You can view a replay of that discussion here.](#)







Live webinar

CEO Panel Webinar

Strengthening client relations and increasing engagement for a more successful practice.

December 15, 2020
10am PT | 1pm ET

REDTAIL

-  Brian McLaughlin
CEO, Redtail Technology
-  Adam Holt
CEO, AssetMap
-  Aaron Klein
CEO, Riskalyze
-  Alex Wingert
President, Advisor Websites

What's New in Integrations?



[FinFolio](#)'s new integration with Redtail synchronizes clients, notes, tasks, investment accounts and positions with values. You can control which items are synced, the directionality of the sync (e.g. one- vs. two-way) and how often the

sync happens. [Learn more about FinFolio and this integration with Redtail 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:

[New Partner Spotlight: Holistiplan](#)

Wednesday, January 6, 11:00 am Pacific

[How to Tackle Data Clean Up](#)

Thursday, January 7, 11:00 am Pacific

[Three keys to unlock unlimited growth and supercharge productivity](#)

Tuesday, January 12, 10:00 am Pacific

[Redtail Essentials: Manage Your Account](#)

Thursday, January 14, 11:00 am Pacific

[New Partner Spotlight: Levitate](#)

Tuesday, January 19, 10:00 am Pacific

[Tour Of The Contact Record](#)

Thursday, January 21, 11:00 am Pacific

[Best Practice Partner Webinar: Aidentified](#)

Tuesday, January 26, 10:00 am Pacific

[Redtail Essentials: Today Page](#)

Thursday, January 28, 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!



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