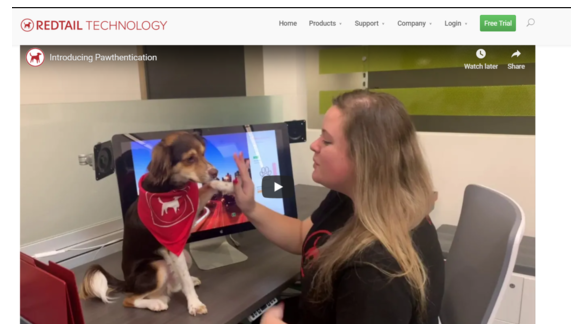




WHAT'S NEW {S} LETTER

PAWthentication

We like to have a little fun on April Fools' Day each year, and yesterday was no exception! We hope you all enjoyed our efforts this time around. Thanks to David Sipe, one of our Infrastructure Engineers, for the prank idea this year, and to Malcolm, who is the canine companion of Subject Matter Expert Hayley Mandrup, for serving as the model in our prank. If you were out of the office yesterday, you can still [learn more about PAWthentication](#).



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?

[Anvil](#) removes the client pain of gathering account information, by replacing your pile of forms with a single, secure, easy-to-complete web form. Details for their integration with Redtail are available [here](#).



Betterment
For Advisors

[Betterment](#) aims to improve advisors' workflows through integrations with tools that they use every day, like CRM software. Details for their account feed integration with Redtail are available [here](#).

2019 Redtail Universities!

RTU is coming to **Denver on June 11** - you can register [here](#).
[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:

[Workflow Series - Part 1: Whiteboarding / Conceptualizing:](#)

Thursday, April 4, 11:00 am Pacific

[Workflow Series - Part 2: Building in the CRM:](#)

Thursday, April 11, 11:00 am Pacific

[Workflow Series - Part 3: Applying the Workflow:](#)

Thursday, April 18, 11:00 am Pacific

[Workflow Series - Part 4: Enhancements / Automations:](#)

Thursday, April 25, 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:

SSG Conference: April 24–26, La Jolla, CA

SEI SAC: April 28–30, Scottsdale, AZ

Founders Financial Conference: April 29-May 2, Naples, FL

Investment Center Conference: April 29–May 2, New Orleans, LA

SFA National Conference: April 29–May 2, La Jolla, CA

Envestnet Advisor Summit: April 30-May 2, Austin, TX

Geneos National Partners Conference: May 2-5, San Antonio, TX

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: Palm Beach, FL



redtailtechnology.com | support@redtailtechnology.com

800-206-5030



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