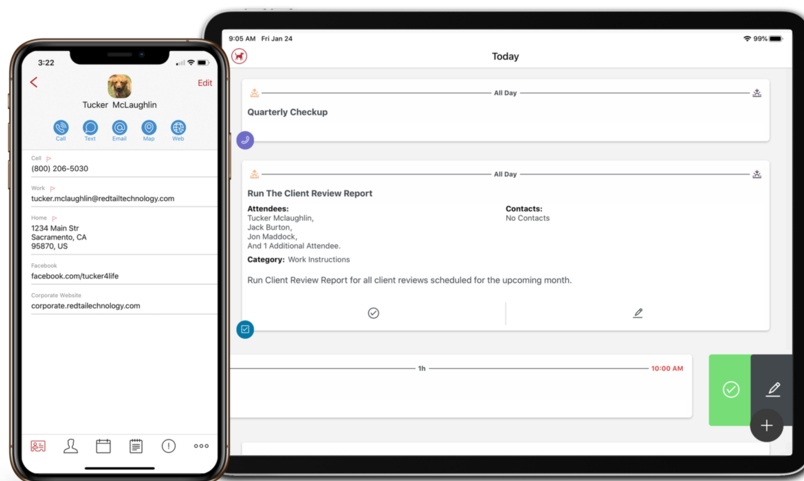


Redtail News

March 2020

Redtail Mobile is all new!

If you missed the news in February, we announced a new mobile version of Redtail CRM. We've been receiving great feedback since release, but if you haven't tried it out yet and want to learn more, [you can do so here](#).



2020 T3/Inside Information Advisor Software Survey Results

We were so thankful to everyone in our Redtail community for participating in this annual survey of advisor's software choices and their satisfaction levels with those technologies. Redtail's market share percentage and average rating were both exciting and humbling and we will continue working hard to earn the trust you've placed in us. [Get more details on that survey/report here.](#)

Redtail is honored to be recognized for the second year in a row as the market leader in **CRM Tools**

Redtail makes #11 on Arizent's Best Fintechs to Work For



We love it when advisors love what we are doing; we also love it that our employees love coming to work every day! [You can read more about everyone recognized \(which also includes some of our partners\)](#)

[here!](#)

Are You Planning to Celebrate Your Clients in 2020?

As Redtail's Training Team Lead, Ricky Redtail spends a lot of time talking to advisors, trying to assist them in their efforts to



improve client experience. In one of his gigs prior to joining Redtail, Ricky sat at the foot of those masters of client experience: Disney! Now, he wants to share some tips on how you can celebrate your clients like Disney does. [Part 1 is available here](#)—and [Part 2 is here](#).



Redtail's CRM Toolkit Series 2020

Redtail University 2020 is tool- and building-themed. In our CRM Toolkit Series 2020 we look forward to sharing some of the ways that you can use Redtail in your office to accomplish specific tasks or tackle common

processes. Redtail Trainer Hayley Mandrup wrote [an introduction to this series which you can read here](#)—each subsequent installment in the series will be published around the time of one of our RTU events throughout the remainder of the year.



What's a Redtail Advisor Hero?

In January we kicked off our Advisor Hero campaign, where we hope to be able to shine a bright light on the amazing stories many of the advisors we work with are writing through the services they are performing in their communities and beyond. Our most recent featured Advisor Hero story is about [Brenda Blisk](#).

What's New in the CRM?

February updates included [new filtering options for the Contacts by RMD Report](#) (in response to passage of the SECURE Act), as well as updates and bug fixes in the Calendar, Notifications, and Reporting areas of Redtail CRM. You can read more about those and our other recent updates to the CRM via our Release Notes [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:

[Redtail Essentials: Integrations](#)

Thursday, March 5, 11:00 am Pacific

[Best Practice Partner Webinar - Orion](#)

Wednesday, March 11, 9:00 am Pacific

[Ask a Trainer!](#)

Thursday, March 12, 11:00 am Pacific

[Best Practice Partner Webinar - Lead Pilot](#)

Tuesday, March 17, 10:00 am Pacific

[Redtail Essentials: Accounts](#)

Thursday, March 19, 11:00 am Pacific

[How To Prepare for the Wealth Transfer](#)

Thursday, March 26, 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:

Chalice Boost Conference : March 2-4, San Diego, CA

AIC Wealth Management and Advanced Solutions Forum: March 3-5, Las Vegas, NV

iPipeline Connections: March 15-17, Las Vegas, NV

LIFT Symposium: March 27, Dayton, OH

SEI SAC National : April 19-21, National Harbor, MD

InvestmentNews RIS: April 20-21, Chicago, IL

SFA National Conference: April 20-23, Asheville, NC

SSG National Conference: April 22-24, La Jolla, CA

Hilltop Education Conference: April 26-28, Dallas, TX



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