

Redtail News

August 2021



Ricky Redtail had a busy month

We were happy to announce last month that **Rick Williamson, aka Ricky Redtail, has been promoted to Redtail's Director of Training and will lead our 2022 RTU Live efforts.** On top of his new job responsibilities, Rick was also busy sharing his thoughts on 1) how we might better get a handle on some common cognitive biases and 2) what the pandemic revealed to financial advisors about connecting with their future clients. You can read each of those at the links below:

[Promotion announcement](#)

[Cognitive bias post](#)

Pandemic lessons for advisors post



Redtail's Best Paw Forward Photo Challenge July winners

Cooper, Chessie, and Emmi took home the medals in July and will be featured in our assortment of CRM login pages for the month of August! Click below to see the winners and the other contenders (this month it was a nailbiter that came down to the very end). [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, Joel Vlasnik, here](#)

 **Release Note Focus**

Preferred gender pronouns can now be added to contact records

You can now add an individual's preferred gender pronouns within the Basic Information area of their contact record in order to reflect that person's gender identity.

[Learn more 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 July 2021 installment of this series now:

[How to customize your Contact Record preferences](#)

What's new in integrations?

Plain  Wealth

Plain Wealth's new integration with Redtail leverages information within Redtail CRM to provide advisors with a client-facing app, white-labeled to their name and brand.

[Learn more >](#)

 zapier

Zapier is a bridge-building application that allows users to connect Redtail to other technology services without the need for a native integration between the two. Our updated integration with Zapier makes new Trigger and Action events available within Redtail CRM.

[Learn more >](#)



RTU Online

Tools for building a
**BETTER
TOMORROW**

 **REDTAIL**

REGISTRATION
OPEN!
AUG 17 + 18

The banner features a blue background with a white grid pattern. At the top left, there is a white rounded rectangle containing the text 'RTU Online'. Below this, the text 'Tools for building a' is written in a white script font, followed by 'BETTER' and 'TOMORROW' in large, bold, white, all-caps sans-serif font. At the bottom left, the Redtail logo (a red dog head icon) and the word 'REDTAIL' in red, all-caps sans-serif font are displayed. On the right side, a yellow sticky note is tilted, containing the text 'REGISTRATION OPEN!' and 'AUG 17 + 18' in black, all-caps sans-serif font.

Our last RTU Online sessions for 2021 now open for registration

Our RTU Online series takes place over two days, covering a variety of intermediate tools and strategies.

Day 1 of RTU Online will focus on your data and processes, giving you tips on how to keep your CRM clean, and how to utilize Workflows to keep your office running smoothly and consistently.

Day 2 of RTU Online is all about strategically applying various tools throughout the CRM to build your prospects, convert them to clients, and keep those clients around for a long time.

[Register now](#)

Upcoming webinars [view all >](#)

Truly automate processes using Zaps with Zapier and Redtail

- Tuesday, August 3, 10:00am Pacific

[Learn more >](#)

Best Practice Partner Spotlight - Logicly with ETFLogic

- Wednesday, August 4, 10:00am Pacific

[Learn more >](#)

Exploring the Mobile App - Thursday, August 5, 11:00am Pacific

[Learn more >](#)

Practice Management Takeover with Derek Notman, Founder of

Conneqtor - Tuesday, August 10, 10:00am Pacific

[Learn more >](#)

Redtail Essentials: Notes - Thursday, August 12, 11:00am Pacific

[Learn more >](#)

How to Handle RMDs - Thursday, August 19, 11:00am Pacific

[Learn more >](#)

Redtail Essentials: Reports - Thursday, August 26, 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.

August 19, 2021

A Virtual Showcase of
Advisor Technologies

advicetech live

Introducing AdviceTech.LIVE

We're thrilled to support this year's AdviceTech.LIVE event bringing together the who's who of the financial technology industry.

Join us along with our advisor-facing fintech peers and some of the top thought leaders in the industry on Thursday, August 19, to see 20 speed demos from the tech companies you use and hear unique

thought leadership from 20+ leaders on the following topics: Client Engagement, Financial Wellness, and Advice Accessibility.

Here's a quick breakdown of what's in it for you:

- 20 of our industry's top thought leaders on five panels to discuss how advisors should best approach these technologies
- 20 leading tech companies making main-stage 10-minute presentations on their newest capabilities and features
- Join us in supporting the Foundation for Financial Planning, which will receive half of all proceeds

[Save your seat](#)

Upcoming conferences

Here's a list of those conferences at which Redtail representatives will be in attendance in the coming month:

United Planners Conference: August 3-5 (Virtual)

IFG National Conference: August 4-6 (Carlsbad, CA)

LPL Focus: August 4-6 (Virtual)

AdviceTech.LIVE: August 19 (Virtual)

Orion Ascent Conference: August 30 - Sept. 2 (Scottsdale, AZ)

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