

Redtail News

September 2019

Redtail named LPL's Vendor Affinity Partner of the Year!

We were both honored and excited to be named **LPL's Vendor Affinity Partner of the Year** at the recent 2019 LPL Focus Conference in San Diego. David Mehlhorn, Redtail's Director of Sales, is all smiles after learning about this recognition.



Redtail again makes the Inc. 5000

For decades, *Inc.* has recognized the fastest-growing private companies in America. We're happy to report that this is our 7th year in a row making it onto the [Inc. 5000 list!](#)

Summer Internship Program a great success

On August 9th, we wrapped up an eight-week Software Development Internship program. We are so proud of these four hard-working Interns from California State University-Sacramento. Their diligent efforts resulted in a

new room scheduling software for use in our Sacramento headquarters.



Volunteer work in the community

In August, a group of Sacramento 'Tailers donated their time to help with landscaping, painting, and floor prep for a Habitat for Humanity build. We're proud of our staff members and excited to play a small part in the fantastic work Habitat is doing in our area!

Three Ways Advisors Should Use Texting to Grow Their Practices

Dusty Russell, Relationship Manager at Redtail, [was thinking about texting dos and don'ts in July](#). In August, he shared some great ideas for how you can use texting to grow your practice [in a piece published at WealthManagement.com](#).



What's New in the CRM?

If you didn't hear, we rolled out the ability to create [Activity and Note Templates](#) in Redtail CRM last month. You can read more about those and our other recent updates to the CRM via our Release Notes [here](#).



What's New in Integration?



[Advisor Controls](#) offers an easy-to-use solution for understanding and advancing clients' retirement income stories. Details for their new integration with Redtail are available [here](#).



ADVISOR
INNOVATION LABS

[Advisor Innovation Labs](#) offers integrated and intuitive digital solutions for Institutional Financial Services Firms, Bank Wealth Management Organizations, Independent Advisor Networks, and Broker-Dealers. Details for their integration with Redtail are [here](#).

2019 Redtail Universities!

RTU Sacramento is now open for registration—you can click its icon below to begin the registration process now. [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:

[Ask a Trainer](#)

Thursday, September 5, 11:00 am Pacific

[How to Handle Canceled Appointments](#)

Thursday, September 12, 11:00 am Pacific

[Redtail Essentials: Broadcast Email](#)

Thursday, September 19, 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:

XYPN Live: September 9-11, St. Louis, MO

Berthel Fisher National Conference: September 10-13, Coralville, IA

Bob Veres Insiders Forum: September 11-13, Nashville, TN

NAIFA Conference: September 11-14, Orlando, FL

HTK Discover Conference: September 16-18, Philadelphia, PA

Ameritas Connection: September 16-18, Cincinnati, OH

LFN Fall Forum: September 17-18, Atlanta, GA

Albridge Forum: September 17-18, San Diego, CA

SS&C Deliver: September 17-19, Orlando, FL

IFA Conference: September 24-27, Clearwater Beach, FL

Cambridge Ignite: September 25-28, Aurora, CO

ONESCO Conference: September 25-29, Palm Springs, CA

CFD Fall Conference: September 26-27, Kokomo, IN

Packerland Annual Conference: October 2-3, Green Bay, WI

Lincoln Investment Wealth Management Forum: October 2-4, Philadelphia, PA

Riskalyze Fearless Investing Summit: October 2-4, Boston, MA

Kovack National Conference: October 2-4, Fort Lauderdale, FL

Valmark Annual Conference: October 13-16, Orlando, FL

eMoney Summit: October 14-16, Austin, TX

LFN Staff Forum: October 15-17, San Antonio, TX

FPA Annual Conference: October 16-18, Minneapolis, MN

American Portfolios: October 23-25, Uncasville, CT

GWN Educational Conference: October 23-26, Hollywood, FL

JW Cole Advisor Symposium: October 27-30, Denver, CO

Advisor Group ConnectED: October 27-30, Nashville, TN

Cadaret Grant Advisor Forum: October 28-30, Verona, NY

T3 Enterprise Conference: October 28-30, Fort Lauderdale, FL



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