

Redtail News

August 2019

Redtail featured at *WealthTech Club*

Vasyl Soloshchuk recently traveled to our headquarters in Sacramento, spent some time with CEO Brian McLaughlin, and featured Redtail and Brian in two pieces on the *WealthTech Club* website, [Redtail: The Evolving CRM System Built for Financial Professionals](#) and [WealthTech Insights #67 with Brian McLaughlin: What can Replace All-in-one Solutions?](#)



Texting your clients? Read this first

Dusty Russell, Relationship Manager at Redtail, had a piece published over at *InvestmentNews* in July that offers advisors a healthy handful of dos and don'ts when it comes to texting in an advisor-client relationship. [You can read that here.](#)

Female Advisor Network offers discounts from top tech vendors

Redtail is proud to be one of the original technology vendors offering pricing discounts for female advisors who join Nina O'Neal's recently launched Female Advisor Network. We're excited for Nina and look forward to seeing this organization grow and thrive! [Learn more here.](#)



Technology: Possibilities, limitations and why you still



need leadership

“You can’t shortcut the very human-dependent elements of your business simply because your technologies allow you to streamline some of those activities which don’t require a human’s touch.” Read this and other leadership insights from Redtail CEO Brian McLaughlin [in a recent piece by Terri Williams over at *The Economist*.](#)

What’s New in the CRM?

We’ve added the ability to create Opportunities from voice dictation messages sent to Redtail from Mobile Assistant or CopyTalk, as well as a significant number of updates for Workflows, Reporting, Notes and User Experience. You can read more about those and our other recent updates to the CRM via our Release Notes [here](#).



What’s New in Integration?



[MyBlocks](#), from Envestnet MoneyGuide, is designed to create a meaningful and personal experience for clients that promotes productive financial conversations. Details for this integration with Redtail are available [here](#).

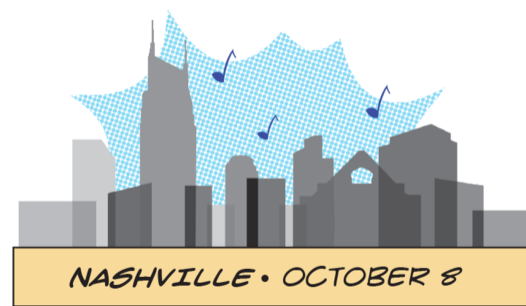


The [Orion](#) integration with Redtail now features two-way syncing of contact data between linked households in the two platforms. Details for the integration are [here](#).

2019 Redtail Universities!

Minneapolis and Nashville RTUs are open for registration—you can click their respective icons 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:

[New Partner Spotlight - Real Wealth Marketing](#)

Tuesday, August 6, 11:00 am Pacific

[Business Development: Systematically applying your Sales Cycle](#)

Thursday, August 8, 11:00 am Pacific

[Business Development: Using the CRM to track New Business](#)

Thursday, August 15, 11:00 am Pacific

[Redtail Essentials: Opportunities](#)

Thursday, August 22, 11:00 am Pacific

[How to Prepare for the Wealth Transfer using Redtail CRM](#)

Thursday, August 29, 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:

LPL Focus: August 18-21, San Diego, CA

Ladenburg East Coast Conference: August 19-22, Washington, D.C.

IFG National Conference: August 21-25, San Diego, CA

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

Wealth Management Awards: September 12, New York, NY

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

Ameritas Connection: September 16-18, Cincinnati, OH

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



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