











Redtail News

October 2019

Retriever Cloud for Google is here!

If you missed the earlier announcement, Redtail CRM subscribers now have true twoway contact and calendar sync capabilities between Redtail and Google. Instructions for setting up the process as well as information about what is included in the sync can be found here.

REDTAIL



©2018 Google LLC All rights reserved. Google and the Google logo are registered trademarks of Google LLC



Winner - Technology **Providers: CRM**

the event can be found here.

Brian McLaughlin, CEO, and David Mehlhorn, Director of Sales, were excited and honored to be on hand recently at

WealthManagement.com's fifth annual Industry Awards in Manhattan, where Redtail was awarded as the winner in the Technology **Providers: CRM** category. More information on

What's New in the CRM?

In addition to Retriever Cloud for Google (see above), we also rolled out some updates for your Redtail Calendar. You can read more about those and our other recent updates to the CRM via our Release Notes here.



What's New in Integration?



CreativeOne is a diversified financial services organization focused on investment and retirement income tactics. Details on the new integration with Redtail are available 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:

Retriever Cloud Integrating with Google

Tuesday, October 1, 10:00 am Pacific

Redtail Essentials: Seminars

Thursday, October 3, 11:00 am Pacific

Redtail Essentials: Mail Merge

Thursday, October 10, 11:00 am Pacific

Using Seminars for your events

Thursday, October 17, 11:00 am Pacific

Best Practice Spotlight - RightCapital

Tuesday, October 22, 11:00 am Pacific

Client Loyalty: How to track loyal clients in Redtail CRM

Thursday, October 24, 11:00 am Pacific

How to handle multiple rep codes

Thursday, October 31, 11:00 am Pacific

Our webinars are *free* to users. You can see the <u>full schedule for upcoming webinars here</u> 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:

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

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

Sigma/Parkland Conference: November 4-5, Detroit, MI

Schwab IMPACT: November 4-7, San Diego, CA,

H Beck National Symposium: November 6-8, Bethesda, MD Tech Retreat Western Roundtable: November 6-8, Sonoma, CA 1st Global National Conference: November 10-12, Austin, TX

IFG Practice Management Forum: November 17-20, Dana Point, CA



<u>redtailtechnology.com</u> | <u>support@redtailtechnology.com</u>

800-206-5030









Privacy is important to us; therefore, we will not sell, rent, or give your name or address to anyone. At any point, you can use the link at the bottom of any of our newsletters to opt out from future mailings.

Share this email:







Manage your preferences | **Opt out** using **TrueRemove**® Got this as a forward? **Sign up** to receive our future emails.

View this email online.

3131 Fite Cir Sacramento, CA | 95827-1801 United States

This email was sent to .

To continue receiving our emails, add us to your address book.



<u>Subscribe</u> to our email list.