REDTAIL

Retriever Cloud for Google is here!

If you missed the earlier announcement, Redtail CRM subscribers now have true two-way 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

Google

Winner – Technology Providers: CRM

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 the event can be found **here**.

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 **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:

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

REDTAIL

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