

Redtail News

July 2019

What's New in the CRM?

Our latest round of updates includes a popular Calendar request, a ton of Reporting and User Experience additions/updates/bug fixes, and a couple of small time-saving updates for Seminars and Workflows. You can read more about those and our other recent updates to the CRM via our Release Notes [here](#).

What's New in Integration?

[FinLife CX](#), from United Capital, is now available as an integration for all Redtail users. Details for their integration with Redtail are available [here](#).

FinLife 

2019 Redtail Universities!

Minneapolis and Chicago XL 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 - Aqumulate](#)

Tuesday, July 9, 11:00 am Pacific

[Redtail Essentials: Reports](#)

Thursday, July 11, 11:00 am Pacific

[Practice Management Spotlight: Strategies for Improving Workflow
Functionality with Adam Cmejla](#)

Wednesday, July 17, 10:00 am Pacific

[Using Redtail CRM to help track RMDs](#)

Thursday, July 18, 11:00 am Pacific

[New Partner Spotlight: Intulse](#)

Tuesday, July 23, 11:00 am Pacific

[Practice Management Spotlight with FA Match](#)

Wednesday, July 24, 11:00 am Pacific

[Redtail Essentials: Permissions and Privacy Options / Users & Teams](#)

Thursday, July 25, 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:

1st Global Communities: July 21-23, Frisco, TX

Cetera Connect Conference: July 22-25, Denver, CO

T3 Tech Summit: July 29-30, St. Louis, MO

TD Tech Summit: July 31 - August 1, St. Louis, MO

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



redtailtechnology.com | support@redtailtechnology.com

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.

emma®

[Subscribe](#) to our email list.