



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](#).



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



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