

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



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