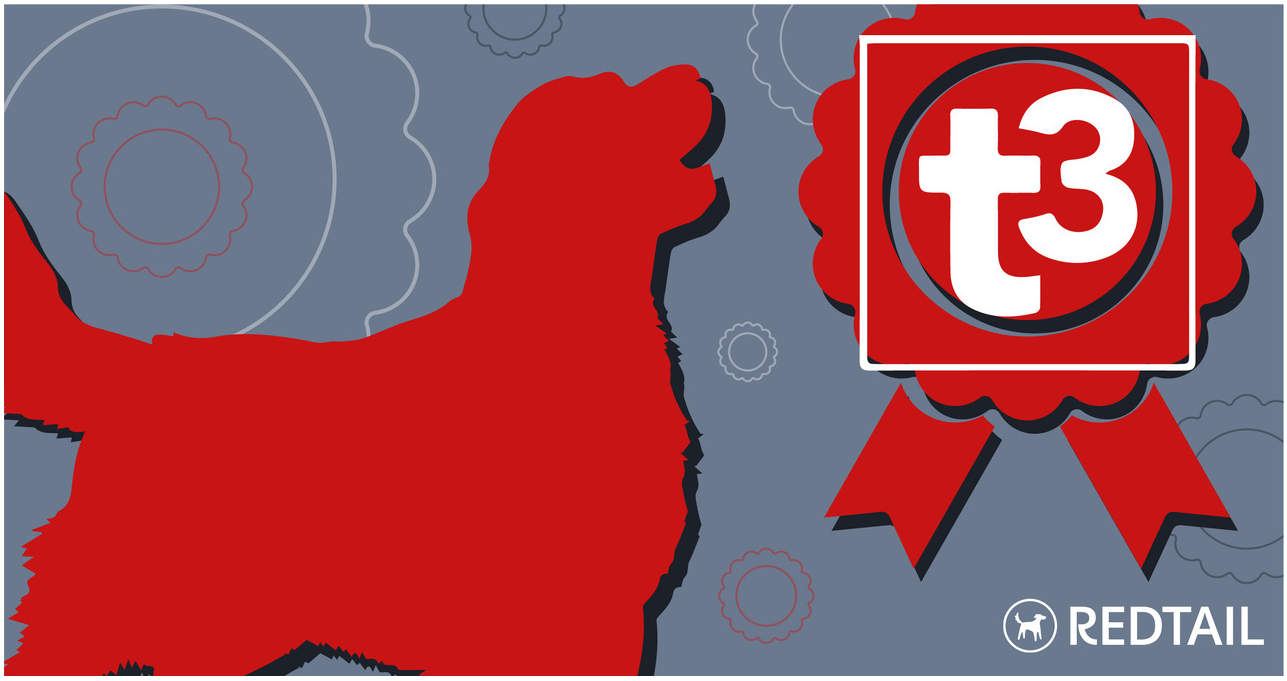
REDTAIL

Redtail News

June 2022



The 2022 T3/Inside Information Advisor Software Survey Results are in!

Thank you so much for your participation! With a huge turnout for the T3 survey this year, we're honored to have achieved the **#1 market share in the CRM Tools Category** with an **average user rating of 8.17** and the **#3 market share in the Document Management Category** with **an 8.28 average rating from users**.

We were also happy to see Orion's strong performance across a number of the survey's categories, and are excited about what the future holds for these two leaders in the fintech industry as we move forward together!

You can see **our Resource Center web page** to learn more about Orion's acquisition of Redtail. We also encourage you to use the links below to see

the full T3 Survey Results, as well as to register for a webinar Orion is hosting on June 29 to provide you with an exclusive look at the future roadmap and a Q&A session where Brian McLaughlin will be joined by Trent Mumma, Orion's EVP of Tech Products.

See full T3 survey results report

Register for webinar now!

Redtail honored to be on American Banker's list of Best Places to Work in Fintech 2022!

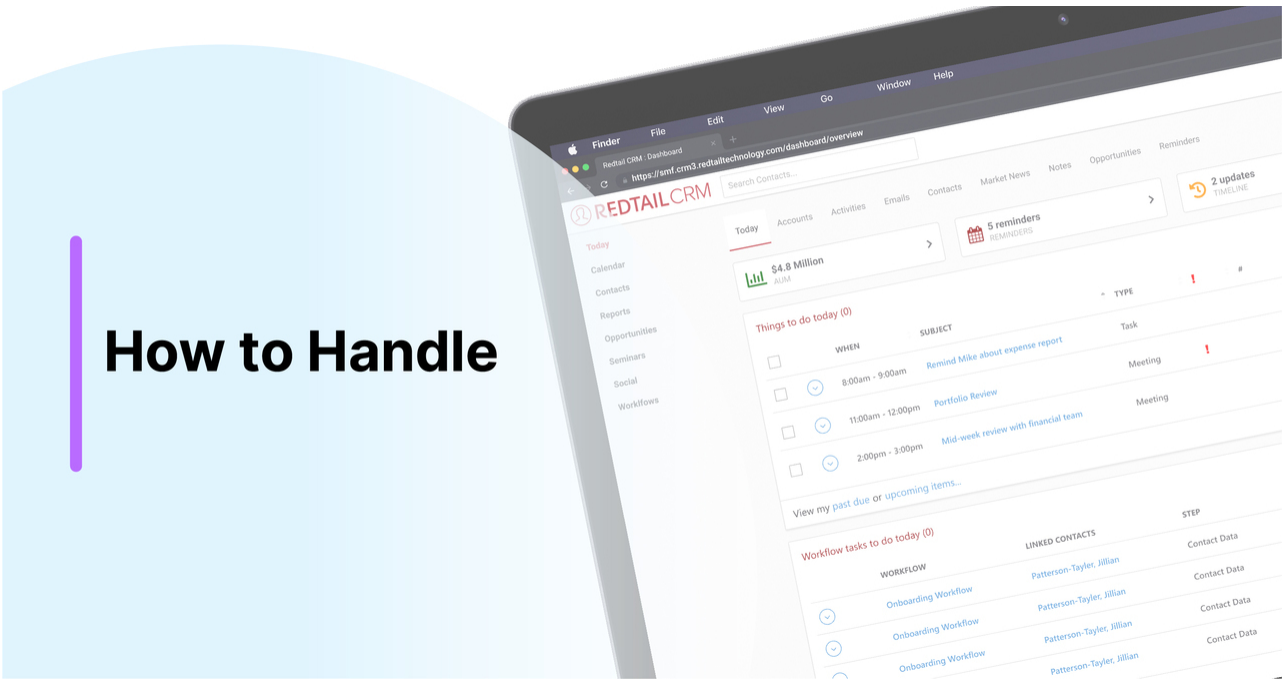
We strive to make both Redtail users and Redtail staff members into raving fans. We're honored today to share that we showed up at #30 on American Banker's list of Best Places to Work in Fintech 2022!

Learn more

What's new in Integrations?

Capitect provides modern technology to streamline the performance reporting, client billing, and portfolio rebalancing processes. This new integration between Capitect and Redtail includes the ability to pull client households and underlying users from Redtail without the advisor having to manually enter them.

Learn more >



Tips from Redtail’s Training Team: How to Handle...

Redtail’s Training Team puts together these “How to Handle” posts in order to make you aware of some of the ways you might use Redtail CRM to assist with processes, events, etc., that are likely to come up for most offices at one point or another.

Read "How to Handle Client Death" now

Redtail University Live events are back for 2022!

Get your maps and backpacks ready, trailblazers, because **Redtail University LIVE** is once again offering our cross-country, in-person events in 2022! This year, we're celebrating the beauty of our National Parks and using their guiding principles of conservation and growth to teach you about one of the most valuable tools in your office.

You can register now for the Redtail University events below. Registration for future events will open as we get closer to those dates.

Philadelphia, PA Registration

Kansas City, MO Registration

Manage your CRM series: an ongoing Redtail resource

Redtail CRM offers you a ton of opportunities to customize your CRM, both at the individual and at the database level. Read the May 2022 installment of this series now:

Manage your CRM: Manage Automations

Redtail's Best Paw Forward Photo Challenge May winners

Romeo, Nash & Millie, and Utah are our May winners and will be featured on your CRM login pages for the month of June! Click below to see the winners and the other contenders from May. **Challenge details available here**.

View winners and all contenders

Upcoming webinars view all >

The Value of Dynamic Income Planning w/ Income Lab and Redtail CRM - Tuesday, June 7, 10:00am Pacific

Learn more >

Redtail Essentials: Permissions - Thursday, June 9, 11:00am Pacific

Learn more >

Practice Management Two-Part Takeover with Maureen Wilke: Summer Client Acquisition Strategies - Tuesday, June 14, 10:00am Pacific

Learn more >

Cleaning Up Bad History - Thursday, June 16, 11:00am Pacific

Learn more >

Leveraging AI to Reach Niche Audiences Through Personalized Content - Tuesday, June 21, 10:00am Pacific

Learn more >

How To Handle: Employee Departure - Thursday, June 23, 11:00am Pacific

Learn more >

Orion + Redtail: Transforming Advisor Growth through Next Generation CRM Technology - Wednesday, June 29, 1:00pm Pacific

Learn more >

Redtail Essentials: Documents - Thursday, June 30, 11:00am Pacific

Learn more >

Redtail Speak Overview Demo - Every Monday at 11:00am Pacific

Learn more >

Redtail CRM Overview Demo - Every Tuesday at 11:00am Pacific

Learn more >

30 Minute QuickStart - Every Wednesday at 11:00am Pacific

Learn more >

Our webinars are free to users. Bookmark our **Upcoming Webinar** page or

follow us on social media to stay up-to-date on our upcoming webinars.

Upcoming conferences

Redtail has representatives available at many industry conferences throughout the year. Check out those we plan to attend in the coming months - we'd love to connect with you if you're in attendance as well.

View upcoming conferences

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