

## Redtail News

January 2020

### What Can Replace All-In-One Solutions?

Redtail CEO Brian McLaughlin recently sat down with Vasyl Soloshchuk at *Financial Advisor Magazine* to discuss technologies Redtail has been adopting to streamline data updates across platforms. [You can check out the interview here.](#)



### Redtail's AdvisorComms 2019 Survey

If you missed it in December, we posted a summary of our results from our AdvisorComms survey, which was designed to better understand how financial advisors and their staff are communicating with clients and prospects, and how these communication channels and content choices affect client engagement. [You can read that summary](#)

[here now.](#)

### What's New in the CRM?

December updates included changes for non-database owners in terms of updating multi-factor authentication (MFA) settings, as well as updates and bug fixes in the Contact, Reporting, Seminar and Workflow areas of Redtail CRM. You can read more about those and our other recent updates to the CRM via our Release Notes [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:**

#### [Redtail Essentials: Manage Your Account](#)

Thursday, January 9, 11:00 am Pacific

#### [An intimate conversation with Riskalyze and Redtail CEOs](#)

Wednesday, January 15, 1:00 pm Pacific

#### [Tour of the Contact Record](#)

Thursday, January 16, 11:00 am Pacific

#### [Smart Marketing with Redtail CRM and FMG Suite](#)

Tuesday, January 21, 10:00 am Pacific

#### [Redtail Essentials: Today Page](#)

Thursday, January 23, 11:00 am Pacific

#### [Using Redtail Speak and NextGen Workflows to Efficiently Deliver a Great Client Experience Across Generations](#)

Tuesday, January 28, 10:00 am Pacific

#### [How to Prepare for Client Reviews](#)

Thursday, January 30, 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!

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## **Redtail University 2020**

Dates and locations for Redtail University 2020 were announced recently and we hope you'll be able to join us for one of these fun learning events this year. If you missed that announcement, [you can see where RTU will be heading here](#).



**February 25**

**Phoenix, AZ**

[Click here to register now!](#)

**March 24-25**

**Atlanta, GA—RTU XL**

[Click here to register now!](#)



## 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:

**FSI OneVoice:** January 27-29, San Diego, CA

**Thrivent Advisor Network Summit:** January 29-31, San Antonio, TX

**TD Ameritrade National Conference:** January 29-31, Orlando, FL

**Kestra Conference:** February 3-5, Scottsdale, AZ

**Capital Choice National Conference:** February 13-15, Atlanta, GA

**T3 Advisor Conference:** February 17-20, San Diego, CA

**ProEquities Conference:** February 24-26, Dallas, TX



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