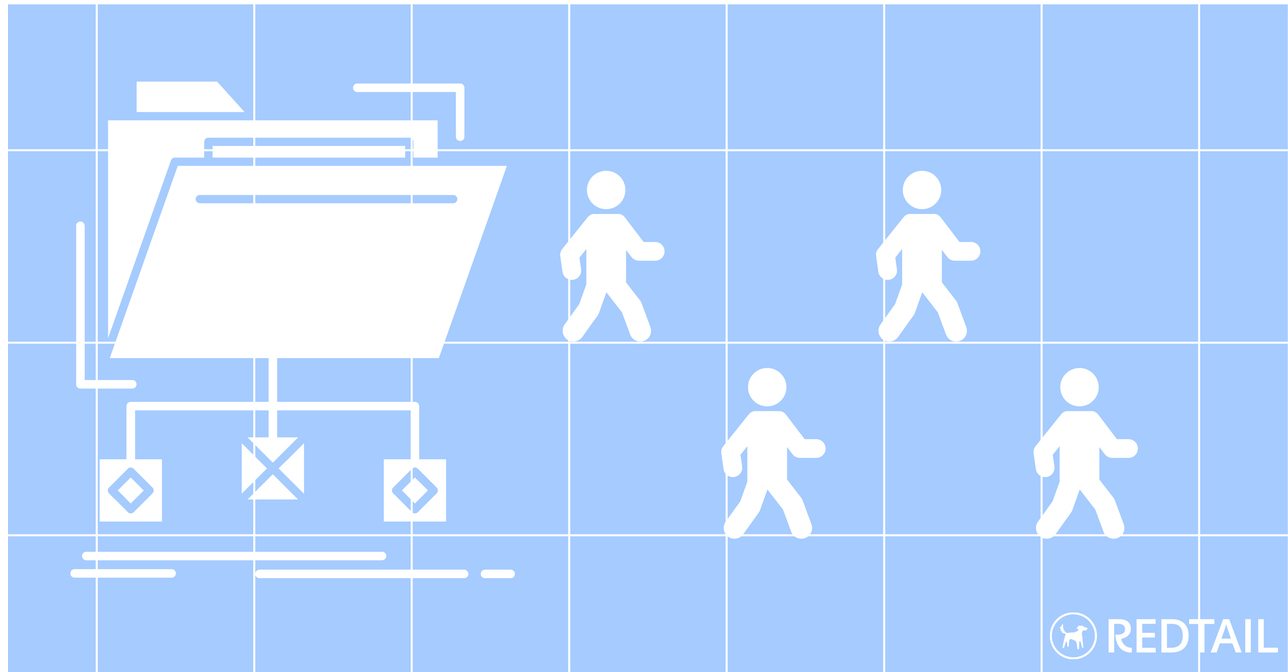


Redtail News

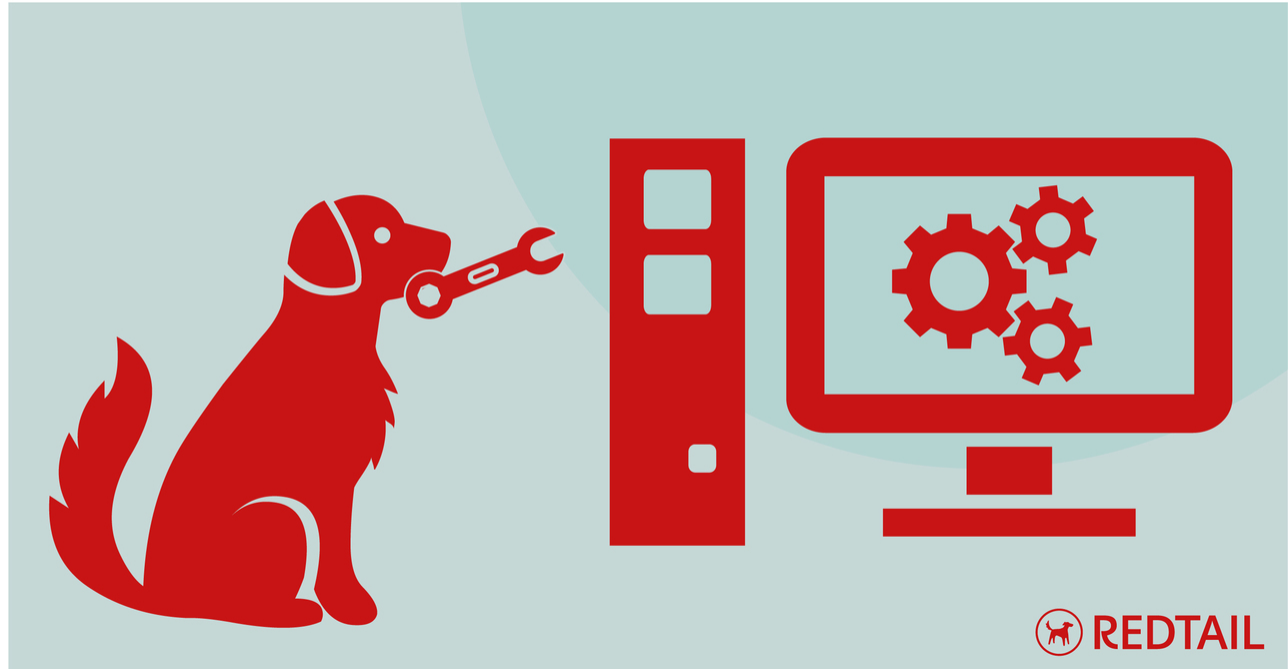
December 2021



Does your advisory firm have a Great Resignation backup plan?

Redtail CEO Brian McLaughlin penned a piece for *Financial Planning* in November with some practical advice for employers to consider during "the Great Resignation", particularly in regard to CRM usage.

[Read it now!](#)



Redtail CRM Scheduled Maintenance Overnight on Friday, December 10th

We sent an email last week but wanted to include a reminder here as well about our scheduled maintenance this Friday night in order that you might make any necessary preparations since Redtail CRM will be inaccessible during this window of time.

Maintenance Start: 10pm PST (1am EST), Friday, December 10th

Maintenance End: 4am PST (7am EST), Saturday, December 11th

Should you have any questions, please do not hesitate to reach out to our Support Team at Redtail.



HOLIDAY RESOURCES



Redtail CRM Holiday Resources

We've updated our Redtail CRM Holiday Resources guide to provide you with an overview of the many ways you can use Redtail CRM along with many of our integration partners for your holiday season client outreach.

[Redtail CRM Holiday Resources guide](#)



Nox

Bjorn Asher
eMoney Advisor

© REDTAIL
Best Paw Forward
Photo Challenge



Pilot

Melissa Yu
Sonoma Private Wealth



Mowgli

Jackson Baird
Birch Cove Group

Redtail's Best Paw Forward Photo Challenge

November winners

Nox, Pilot, and Mowgli are our November winners and will be featured on your CRM login pages for the month of December! Click below to see the winners and the other contenders from November. [Challenge details available here.](#)

[View winners and all contenders](#)



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 November 2021 installment of this series now:

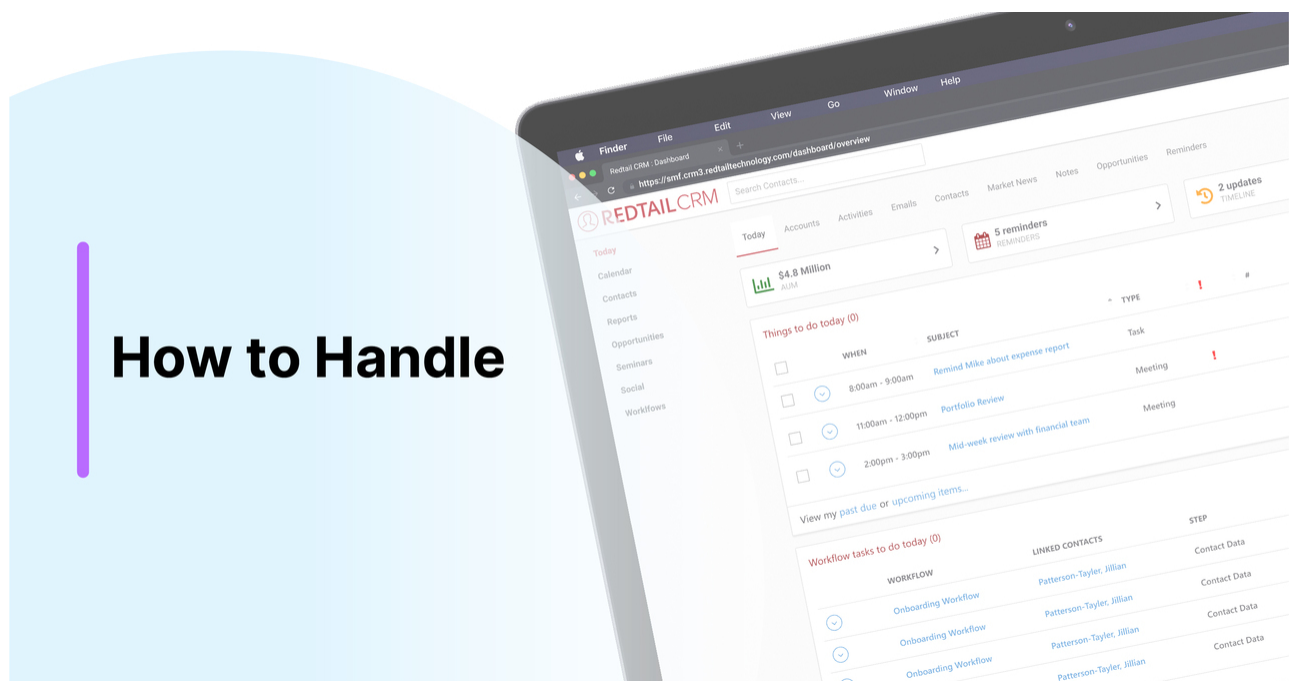
[How to customize your Report and Miscellaneous preferences](#)

What's new in Integrations?



This new integration between **Cy** and Redtail CRM offers advisors the ability to quickly and easily import their clients' profile information from Redtail CRM into their Cy dashboard.

[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 New Employees" now!

Upcoming webinars [view all >](#)

Using the CRM for Client Communication - Thursday, December 9,
11:00am Pacific

[Learn more >](#)

Trainer Chat with Welcome Team - Thursday, December 16, 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.

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