



T3's 2019 Software Survey Report is now available

Redtail was the clear market share leader for CRM in T3's 2019 Software Survey Report. You can read more about that survey and download the entire report [here](#).



Redtail is joining Orion on their Ascent Roadshow

We're excited to be partnering with Orion for the first stop on their 2019 Ascent Roadshow! We'll be on hand in Atlanta for that 2-day joint training event on March 11-12. [Details and registration are available here](#).

What's New in Integration

[Envestnet's](#) new integration with Redtail allows you to set up a feed of your clients' account data from Envestnet to Redtail. Details on how to begin the setup process are available [here](#).



2019 Redtail Universities!



RTU is coming to Baltimore on May 7. [You can register for that event 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 (except Feb. 18) 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 - Red Capture](#): Tuesday, February 5, 11:00 am Pacific

[The Ultimate Debate - Tag Groups vs Keywords](#): Thursday, February 7, 11:00 am Pacific

[Redtail Essentials: Advanced Search](#): Thursday, February 14, 11:00 am Pacific

[New Partner Spotlight - Oranj](#): Tuesday, February 19, 11:00 am Pacific

[Segmenting your Client Data - Building Lists](#): Thursday, February 21, 11:00 am Pacific

[Redtail Essentials: Relationships](#): Thursday, February 28, 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:

[Kestra Ascend](#): February 3-6, Austin, TX

[TD National LINC](#): February 6-9, San Diego, CA

[Capital Choice National Conference](#): February 14-16, Atlanta, GA

[Ameritas AIC Regional](#): February 19-21, San Antonio, TX

[Kestra Advisor Forum](#): February 26, Salt Lake City, UT

[LFN Spring Forum](#): March 4-8, Salt Lake City, UT

[Orion Ascent on the Road \(with Redtail\)](#): March 11-12, Atlanta, GA

[iPipeline Connections](#): March 17-19, Las Vegas, NV

[Private Advisor Group](#): March 24-26, Atlantic City, NJ

[ProEquities APEX](#): March 24-27, Orlando, FL





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