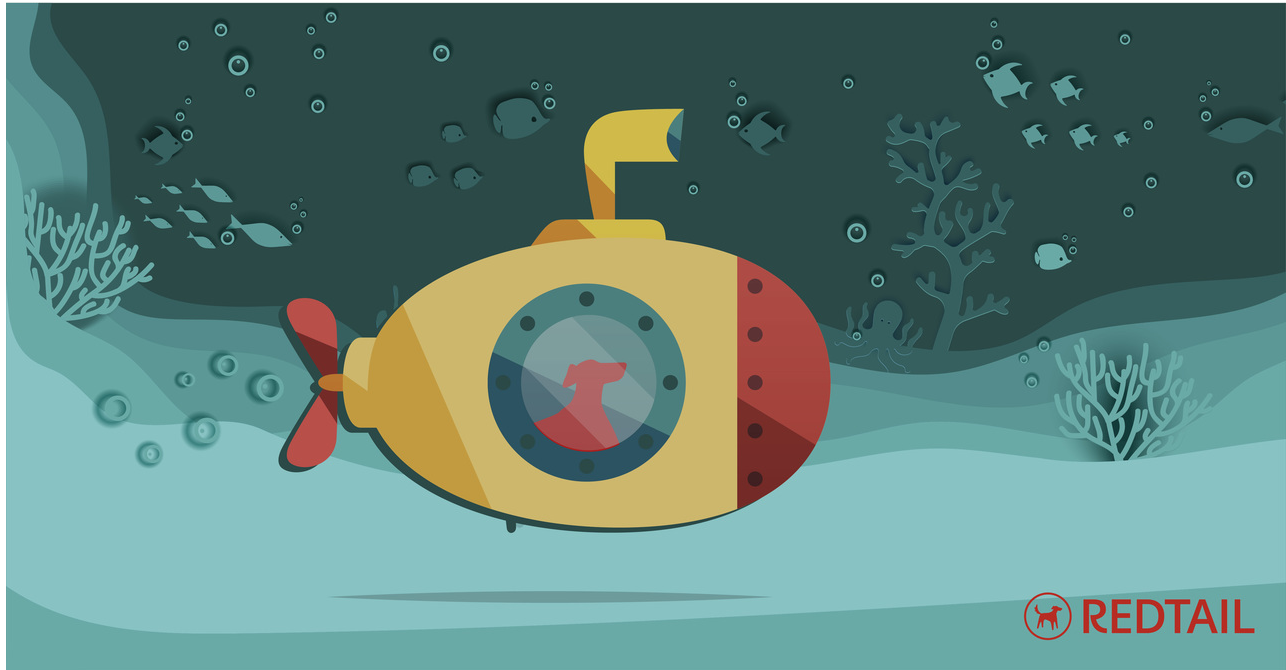


# Redtail News

October 2022



## Redtail has a big new product announcement coming soon!

We can't share any details just yet, but keep your eyes peeled because we're releasing a solution soon to address a pain point common to many advisors. It's going to save you time and effort and help you ramp up your client and prospect engagement efforts. We can't wait to tell you more!

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2022

# Financial Planning Career Perceptions



## Redtail's 5th Annual Survey is now open!

As with our 2021 survey, this year's survey will be distributed to both financial professionals as well as to students in university programs geared toward future employment in finance. Our aim is to continue our process of learning more about the financial services path and future expectations of those currently working in the industry versus the expectations of those looking to enter the industry soon.

We were excited by both the amount of participation as well as by the results we obtained from last year's survey, as they did point toward some actions both the industry and university programs can take to align professional and student expectations more closely. [You can read our Executive Summary of last year's survey here.](#)

Take the 2022 Survey

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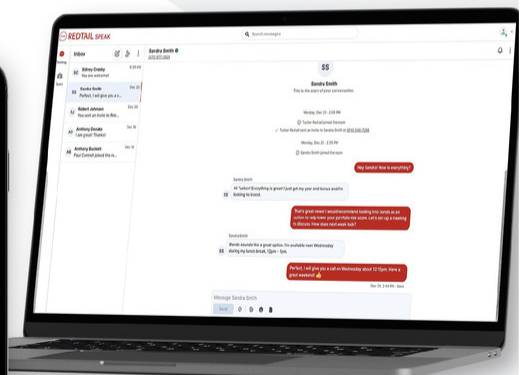
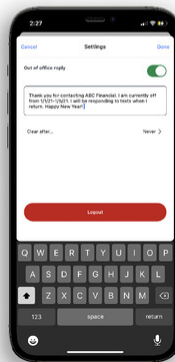
# RELEASE NOTE FOCUS

## Merge fields now available for Broadcast Messaging in Redtail Speak

Merge fields for Broadcast Messaging will provide you with the opportunity to personalize your bulk texts, regardless of how many individuals you are sending a given message to.

[Learn more here](#)

## Compliant Texting for Financial Advisors



# Our Clients Want Us to Text Them. Here's How.

[Brian McLaughlin, co-founder of Redtail Technology and president of Orion Advisor Technology](#), has a new Practice Management piece up at *ThinkAdvisor*. Brian talks about embracing the opportunity that we now have to communicate with our clients via text, while also recognizing the costs that may come should we neglect to put processes in place in order to remain compliant when doing so.

[Read it here](#)

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## What's new in Integrations?



[CurrentClient](#) is a texting platform that integrates video and surveys. This new integration allows you to sync over general contact information into the CurrentClient application, where you can then send texts, videos and surveys to your clients.

[Learn more >](#)



[GReminders](#) is software that automates the process of sending SMS appointment reminders to clients. This new integration with Redtail CRM allows you to automatically send SMS text message reminders to your prospects and clients, create Redtail Calendar appointments from GReminders' automated online scheduling, and more.

[Learn more >](#)



[TIFIN Wealth](#) is an AI-driven platform designed to drive personalization at scale across

investments, financial planning, personality assessments, risk assessments, client communication, private markets, and charitable giving. This new integration allows users to pull in select user lists and associated Portfolio data from Redtail CRM to use within TIFIN Wealth's ecosystem of personalization solutions.

[Learn more >](#)

# REDTAIL UNIVERSITY LIVE 2022



## 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 event below. Registration for 2023 events will open as we get closer to those dates.





**Edwin and Jonas**

Rachel Estis  
Managed Money Concepts



**Dutch**

Candace Horve  
BML Wealth Management



**Remington**

Caprice Thurlow  
Thurlow Wealth Management

REDTAIL  
**Best Paw Forward**  
Photo Challenge

## Redtail's Best Paw Forward Photo Challenge September winners

Edwin and Jonas, Dutch, and Remington are our September winners and will be featured on your CRM login pages for the month of October! Click below to see the winners and the other contenders from September.

[\*\*Challenge details available here.\*\*](#)

[View winners and all contenders](#)

**Upcoming webinars** [view all >](#)

**Redtail Essentials: Relationships** - Thursday, October 6, 11:00am

Pacific

[Learn more >](#)

**Practice Management Takeover with Jen Goldman: Accelerate Growth and Scalability using Collaboration Tools** - Tuesday,

October 11, 10:00am Pacific

[Learn more >](#)

**Redtail Essentials: Templates** - Thursday, October 13, 11:00am

Pacific

[Learn more >](#)

**Building Your Tech Stack - Healthpilot: How Medicare Changes Your Financial Planning Conversation** - Tuesday, October 18,

10:00am Pacific

[Learn more >](#)

**Using Your CRM For Client Communication** - Thursday, October 20,

11:00am Pacific

[Learn more >](#)

**Building Your Tech Stack - PreciseFP: Enhancing your Client Engagement and Onboarding w/ PreciseFP and Redtail CRM**

- Tuesday, October 25, 10:00am Pacific

[Learn more >](#)

**Redtail Essentials: Mail Merge** - Thursday, October 27, 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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## 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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## Access Redtail CRM anywhere



**Stay in touch!**

[redtailtechnology.com](http://redtailtechnology.com) | 800-206-5030



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