

Redtail News

March 2022



How to Easily Communicate With Your Clients the Way They Want You To

Clients often prefer a quick text from you when an email or a phone call are not required. That's why we continue to enhance Redtail Speak as a text/chat solution for advisors. Redtail CEO Brian McLaughlin recently spoke with *Advisorpedia* at the FSI OneVoice Conference about Speak's capabilities.

[Watch the interview](#)



Leadership Lessons from *Zombieland*: Know Yourself and Your True Strengths

Leadership Lessons From *Zombieland*: Know Yourself and Your True Strengths

Our Director of Training, Rick Williamson, recently had a piece published at *WealthManagement.com* that considers one of the most important rules from the film *Zombieland* and how that rule can be applied by advisors to help them overcome some cognitive biases that many of us fall prey to.

[Read it 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.



[Chicago, IL Registration](#)



[Portland, OR Registration](#)



Manage Your CRM

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 February 2022 installment of this series now:

[Manage your CRM: Manage Team Notices and Web Links](#)

What's new in Integrations?



Income Lab is a provider of dynamic retirement planning software for investment advisors. This new integration between Income Lab and Redtail includes the ability to link household and account data from Redtail CRM into Income Lab.

[Learn more >](#)



MyNameFlow is an automated marketing platform that helps Advisors find lost prospects and drive engagement to grow sales. This new integration

allows MyNameFlow users to automatically pull over Individual Contacts from Redtail CRM with email addresses to be included in your automated marketing efforts via MyNameFlow.

[Learn more >](#)



Sadie
Sara-Katherine Johnson
AltruVista



Baylee & Gus
Wes Brown
CogentBlue Wealth



Oliver
Trish Oosterhouse
Lerner, Csernai, and Fath Financial

Redtail's Best Paw Forward Photo Challenge February winners

Sadie, Baylee and Gus, and Oliver are our February winners and will be featured on your CRM login pages for the month of March! Click below to see the winners and the other contenders from February. [Challenge details available here.](#)

[View winners and all contenders](#)

Upcoming webinars [view all >](#)

Building Your Tech Stack - CircleBlack - Tuesday, March 1, 10:00am Pacific

[Learn more >](#)

Workflow Series Part 1 - Conceptualizing and Whiteboarding

- Thursday, March 3, 11:00am Pacific

[Learn more >](#)

Practice Management Takeover with Charesse Spiller - Tuesday, March 8, 10:00am Pacific

[Learn more >](#)

Workflow Series Part 2 - Building Templates - Thursday, March 10, 11:00am Pacific

[Learn more >](#)

Building Your Tech Stack - Onramp Invest - Tuesday, March 15, 10:00am Pacific

[Learn more >](#)

Workflow Series Part 3 - Live Application - Thursday, March 17, 11:00am Pacific

[Learn more >](#)

Building Your Tech Stack - CopyTalk - Tuesday, March 22, 10:00am Pacific

[Learn more >](#)

Workflow Series Part 4 - Enhancing with Automations

- Thursday, March 24, 11:00am Pacific

[Learn more >](#)

Redtail Essentials: Advanced Search - Thursday, March 31, 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 (either virtually or in-person) - we'd love to connect with you if you're in attendance as well.

[View upcoming conferences](#)

Access Redtail CRM anywhere



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