REDTAIL

Redtail News

May 2021

Redtail #12 on Financial Planning's list of Best Fintechs to Work For

We're extremely proud to turn up on this list after a year of working from home. Company culture is built one day at a time, and it's been challenging, exciting, and a joy to continue building ours through largely virtual events and interactions.

Read more here

Redtail's Best Paw Forward Photo Challenge April winner

Bean took the top prize in April and will be featured in our assortment of CRM login pages for the month of May! Click below to see our two runners-up for the month, who will also show up to welcome you on our login pages, as well as the other contenders. **Challenge details available here**.

View winner and runners-up

Practice Management Takeover

"Maximize Your Client Journey for Ultimate Scalability

with Charesse Spiller
Founder of Level Best

REDTAIL

Maximize Your Client Journey for Ultimate Scalability

Charesse Spiller, Founder and Operations Consultant at **Level Best**, authored a guest post for Redtail's blog this past month focused on streamlining the client journey to improve client experience and create a scalable practice. This ties directly into the Practice Management Takeover webinar she did with Redtail last month, **a replay of which you can view here**.

Read her post now!

Hear "The Lost T3 Interview" between Redtail CEO Brian McLaughlin and Craig Iskowitz on The Wealth Tech Today podcast

Pre-pandemic, Redtail CEO Brian McLaughlin joined Craig Iskowitz, founder and CEO of Ezra Group, to talk about all those things they carry that make life on the road easier. Laptop stickers, Oregon Ducks football, and white noise are also discussed.

Hear "The Lost Interview" now!

#advisorhero

In January 2020, we kicked off our **Advisor Hero campaign**. You can **nominate Advisor Hero candidates here.**

> Read about our latest hero, Pamela Sams, here

What's new in integrations?

This integration has been updated to allow linking clients between our two platforms, as well as to include the capabilities to launch Household Summaries from Redtail, create new proposals from Redtail and pre-fill information, etc.

Learn more >

Upcoming webinars   view all >

CEO Roundtable Series Webinar - The Comeback

Tuesday, May 4, 11:00am Pacific

Learn more >

Redtail Essentials: Opportunities

Thursday, May 6, 11:00am Pacific

Learn more >

Practice Management Takeover with Peter Montoya - Marketing That Matters

Tuesday, May 11, 10:00am Pacific

Learn more >

Ask a Trainer!

Thursday, May 13, 11:00am Pacific

Learn more >

Best Practices for Managing Cybersecurity Risk with RIA in a Box

Tuesday, May 18, 11:00am Pacific

Learn more >

Redtail Essentials: Activities

Thursday, May 20, 11:00am Pacific

Learn more >

Best Practice Partner Spotlight - FMeX

Tuesday, May 25, 10:00am Pacific

Learn more >

How to Handle Client Death

Thursday, May 27, 11:00am Pacific

Learn more >

Redtail Speak Overview Demo

Live Every Monday at 11:00am Pacific

Learn more >

Redtail CRM Overview Demo

Live Every Tuesday at 11:00am Pacific

Learn more >

30 Minute QuickStart

Live 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.

Access Redtail CRM anywhere

Download on the App Store   GET IT ON Google Play

Stay in touch!

redtailtechnology.com | 800-206-5030

Twitter Facebook Instagram LinkedIn YouTube

Privacy is important to us; therefore, we will not sell, rent, or give your name or address to anyone. At any point, you can use the link at the bottom of any of our newsletters to opt out from future mailings.