

# Redtail News

May 2022



## Redtail Technology to be Acquired by Orion Advisor Solutions

We couldn't be more excited about this announcement we made on April 19th and look forward to all this will mean in terms of how we will better be able to serve advisors using our solutions. Redtail remains focused on CRM for advisors and will continue to prioritize the enhancement, service, and support experience for Redtail CRM, as well as for our Imaging, Email Archiving, and Speak solutions for advisors.

[Learn more](#)



# RELEASE NOTE FOCUS

## **Saved Report Filters are now available in Redtail CRM!**

If you find that you consistently apply the same filters to one of Redtail's Standard Reports to meet the unique needs of your office, you now have the ability to save those filter options for quicker access to the report data you're looking for!

[Learn how here](#)

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**WealthTechAmericas**  
**AWARDS 2022**

CRM PROVIDER

— WINNER —  
**Redtail Technology**

## **Redtail is a winner at the WealthTech Americas Awards 2022!**

Redtail Technology is honored to have won the CRM Solution Provider award in the US categories at the WealthTech Americas Awards 2022.

[Learn more](#)

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## Redtail Volunteer Days at Front Street Animal Shelter

Over the past few months, Redtail employees have enjoyed volunteering at [\*\*Front Street Animal Shelter\*\*](#) in honor of various national pet holidays. These holidays aim both to support the care of pets as well as to raise awareness of the mistreatment of animals, all while advocating the important part each of us can play in animal rescue.

[Read 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 events below. Registration for future events will open as we get closer to those dates.



Portland, OR Registration

Denver, CO Registration

Philadelphia, PA Registration

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# Manage Your CRM

## Manage your CRM series: an ongoing Redtail resource

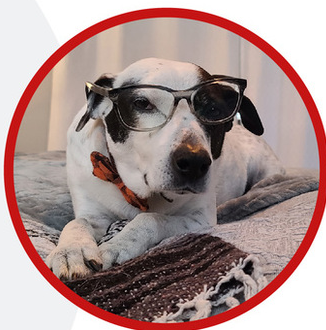
Redtail CRM offers you a ton of opportunities to customize your CRM, both at the individual and at the database level. Read the April 2022 installment of this series now:

[Manage your CRM: Manage Activity Templates](#)



**Beefcake**

Eddie Herrera  
Alliance Financial Partners, Inc.



**Ace**

Damion Feldman & Caresse Vera  
Lumena Financial Strategies



**Twix**

Jackie Marsh  
Glacier Wealth Management

REDTAIL  
**Best Paw Forward**  
Photo Challenge

# Redtail's Best Paw Forward Photo Challenge April winners

Beefcake, Ace, and Twix are our April winners and will be featured on your CRM login pages for the month of May! Click below to see the winners and the other contenders from April. [Challenge details available here.](#)

[View winners and all contenders](#)

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

**Redtail Essentials: Opportunities** - Thursday, May 5, 11:00am Pacific

[Learn more >](#)

**Practice Management Takeover with Deborah Fox** - Tuesday, May 10, 10:00am Pacific

[Learn more >](#)

**Segmenting Your Client Data** - Thursday, May 12, 11:00am Pacific

[Learn more >](#)

**Building Your Tech Stack - StratiFi** - Tuesday, May 17, 10:00am Pacific

[Learn more >](#)

**Redtail Essentials: Activities** - Thursday, May 19, 11:00am Pacific

[Learn more >](#)

**How To Handle: Client Death** - Thursday, May 26, 11:00am Pacific

[Learn more >](#)

**Building Your Tech Stack - Holistiplan** - Tuesday, May 31, 10:00am 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 (either virtually or in-person) - 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** | 800-206-5030



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