

Redtail News

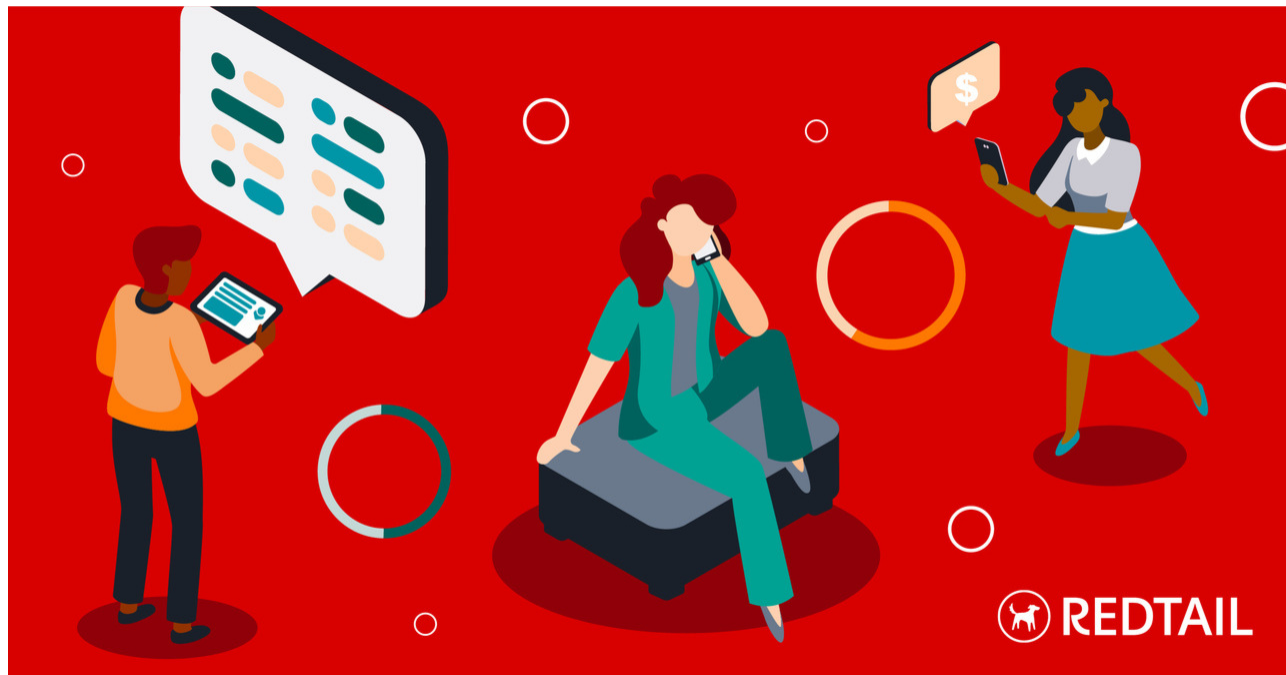
July 2022



3 Lessons National Parks Can Teach Advisors About Their Own Cognitive Biases

Work-related research Redtail's Director of Training Rick Williamson has done over the past year or so has led him to consider some of the remarkable similarities between the mission of our national parks and the mission of financial advisors. At the same time, he's realized they have to fight against many of the same cognitive biases when trying to fulfil those missions, and he shares his thoughts in a recent piece at *Advisor Perspectives*.

[Read it now!](#)

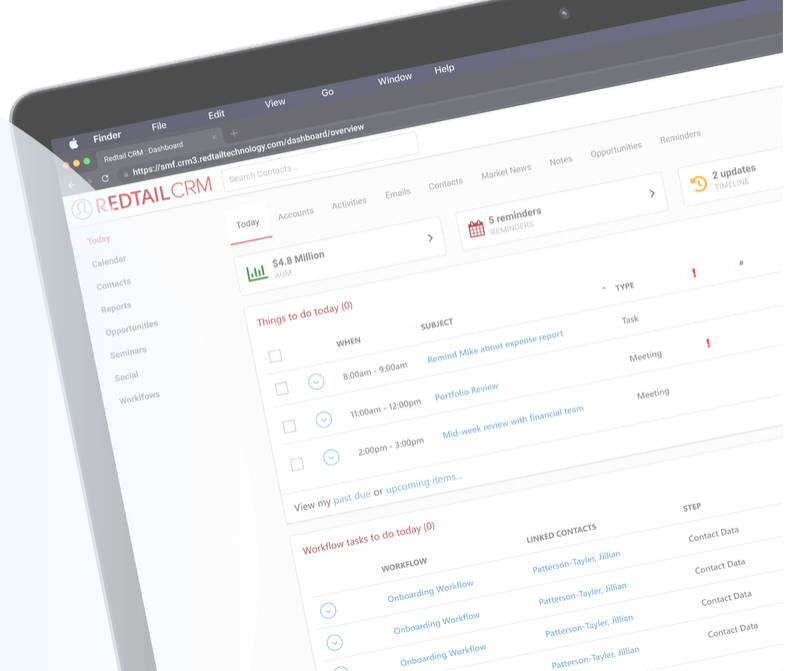


Pre-Graduation Goal Alignment Would Benefit Financial Planning Students and Professionals

Students hoping to set themselves apart from their peers on a financial services path might be wise to prioritize sitting for the Certified Financial Planner (CFP®) exam pre-graduation, given the results of [a recent survey Redtail Technology conducted](#) in conjunction with [Brigham Young University - Idaho](#). Brian McLaughlin, President, CRM at Orion Advisor Technology and Redtail Co-Founder discussed this and more from those survey results in a recent issue of the *Journal of Financial Planning*.

Read it now!

How to Handle



Tips from Redtail's Training Team: How to Handle...

Redtail's Training Team puts together these "How to Handle" posts in order to make you aware of some of the ways you might use Redtail CRM to assist with processes, events, etc., that are likely to come up for most offices at one point or another.

[Read "How to Handle Employee Departure" now](#)

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.



[Kansas City, MO Registration](#)

[Charlotte, NC Registration](#)

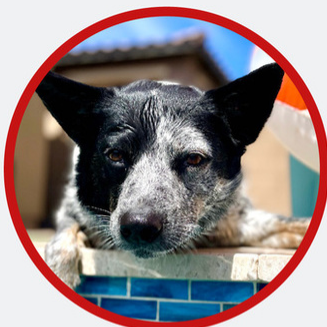


Manage Your CRM

Manage your CRM series: an ongoing Redtail resource

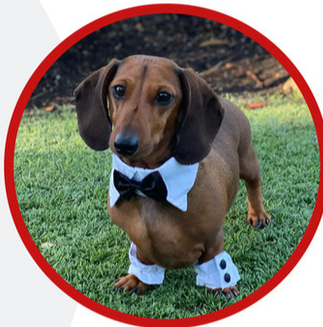
Redtail CRM offers you a ton of opportunities to customize your CRM, both at the individual and at the database level. Read the June 2022 installment of this series now:

[Manage your CRM: Manage Custom Export Templates](#)



Stella

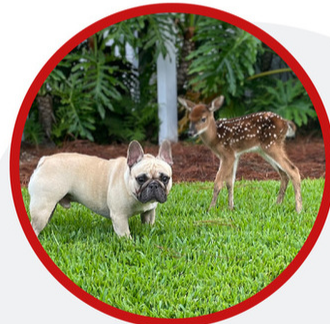
Emily Kittle
Generational Wealth Planning



Simon

Sondra Polan
Prime Investment Advisors

REDTAIL
Best Paw Forward
Photo Challenge



Winston

Wesley Joiner
Legacy Financial Advisors

Redtail's Best Paw Forward Photo Challenge June winners

Stella, Simon, and Winston are our June winners and will be featured on your CRM login pages for the month of July! Click below to see the winners and the other contenders from June. [Challenge details available here.](#)

[View winners and all contenders](#)

Upcoming webinars [view all >](#)

How to take key cloud applications off the open internet

- Tuesday, July 5, 10:00am Pacific

[Learn more >](#)

How to Handle RMDs - Thursday, July 7, 11:00am Pacific

[Learn more >](#)

Practice Management Two-Part Takeover with Maureen Wilke: Summer Client Acquisition Strategies - Part Two - Tuesday, July

12, 10:00am Pacific

[Learn more >](#)

Redtail Essentials: Workflows - Thursday, July 14, 11:00am Pacific

[Learn more >](#)

Redtail Essentials: Automations - Thursday, July 21, 11:00am Pacific

[Learn more >](#)

Launch Quik! From Redtail And More! - Tuesday, July 26, 10:00am Pacific

[Learn more >](#)

Calendar Syncing - Thursday, July 28, 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 - 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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