

# Redtail News

June 2023



## Redtail Plans available beginning this Friday, June 9

Redtail Plans include essential Redtail and Orion solutions, designed for every advisor to scale their firm efficiently. Our new Redtail Growth Plan bundles our industry-leading CRM with Redtail Imaging, Redtail Speak, and integrated Orion Advisor Tech, including: Client Portal, Proposal Generation with New Account Opening, Orion Planning, 3D Risk Profile and behavioral finance tools.



## Take advantage of a limited time offer on Orion Stacks today!

Orion Stacks, which include all solutions in the Redtail Growth Plan plus much more, allow you to get everything you need for your business at a better price when you use (or add) more of our technology and services. We are also offering special pricing this summer; you can learn more at the link below.

[Take advantage of special offer now](#)



## AI assistant now available in Redtail Speak

As Orion CEO Eric Clarke revealed at **Orion Ascent 2023**, we've been working on integrating ChatGPT with our Redtail Speak solution. In case you missed it, we announced earlier last month that the first phase of that development is complete — Redtail Speak users now have the option to begin using the AI assistant to generate potential responses to incoming text messages from their clients.

[Learn more here](#)

A promotional banner for Redtail University LIVE. The background is a light gray and white diamond-patterned plaid. At the top left is the Redtail logo (a red shield with a white dog silhouette). To its right, the text "REDTAIL UNIVERSITY LIVE" is in red, all-caps, sans-serif font. Below this, "Save the Date!" is written in a large, bold, dark blue serif font. To the right of the text are three dark blue icons: a spoon, a knife, and a fork. In the bottom left corner is a circular icon featuring a red dog's head wearing a white chef's hat. To the right of this icon, the text "Redtail Recipes for Success" is written in a red, italicized, sans-serif font.

 REDTAIL UNIVERSITY LIVE

# Save the Date!



 *Redtail Recipes for Success*

**Redtail University LIVE seats still available**

Don't let this educational feast go cold! Seats are still available for these upcoming Redtail University Live stops! Don't miss your chance to learn the best ways to use one of the most essential tools in your office.

Click an event below to secure your seat now for these upcoming locations:



[Boston registration](#)

[Minneapolis registration](#)

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## What's new in Integrations?

As of May 2023, Riskalyze is now Nitrogen. We are working to update their branding within Redtail CRM. You will see some of these changes soon, but more to come as we update screens, links, and training materials related to Nitrogen's integration with Redtail CRM.

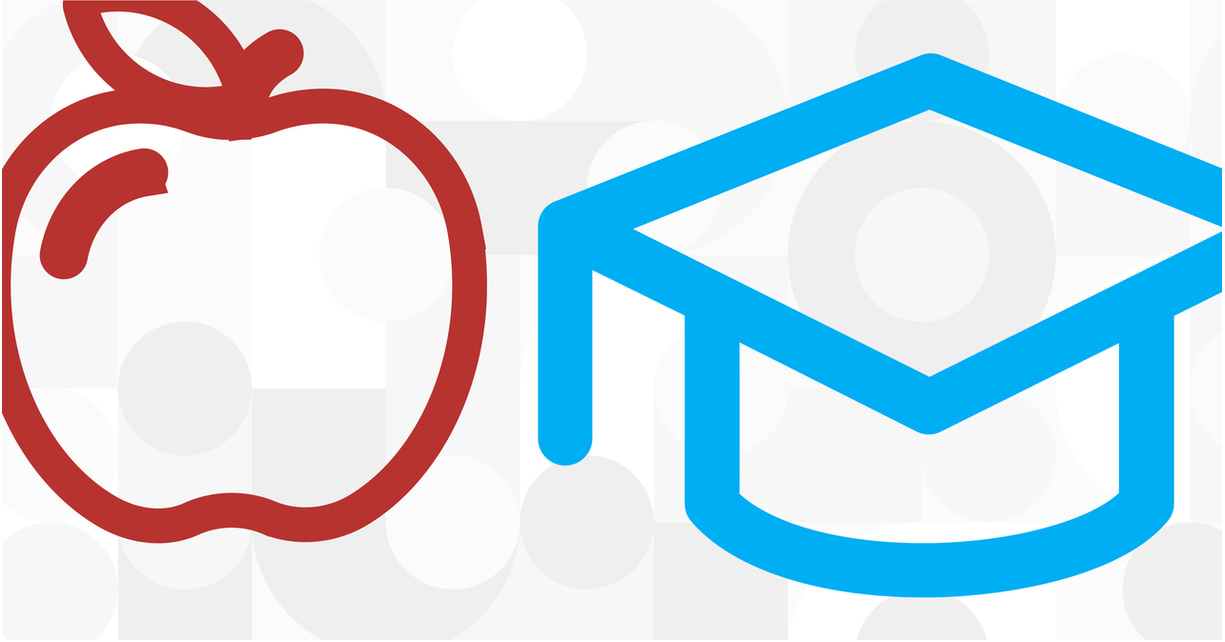
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## **A new support option in Redtail's CRM, Imaging, and Speak solutions**

On May 5th, we rolled out a new tool in Redtail CRM, Speak, and Imaging to offer additional support options and we're happy to say adoption rates have been high. In case you haven't tried it yet, this tool provides digital channels for support, including digital audio and chat, all accessible from within the browser window you're already using. We've also enhanced our co-browsing capabilities to provide immediate contextual support and guide you to a faster resolution. You can click the chat bubble in the bottom right corner of your desktop within any of these applications to take advantage of these support options today.

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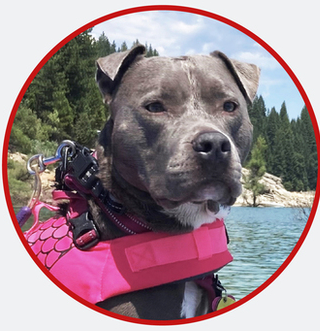


## Have you visited Orion Advisor Academy?

Built on the research and insights of Dr. Daniel Crosby, [Orion Advisor Academy](#) is designed to help you achieve your CE requirements with weekly reporting to CFP and IWI, *all at no cost to you*. Orion Advisor Academy provides practical education in the four pillars of the [Orion Fiduciary Flywheel](#): Prospect, Plan, Invest, and Achieve.

Visit the Academy now!

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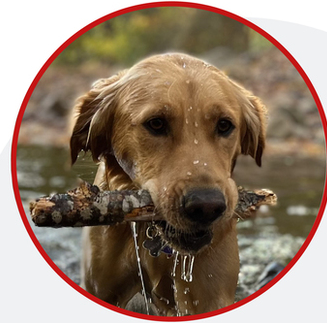
**Sadie**

Crystal Brown  
Plan Well Live Well



**Kirra**

Ally Cropsey  
Frisch Financial Group



**Finley**

Brian Williamson  
Veridian Capital Partners

REDTAIL  
**Best Paw Forward**  
Photo Challenge

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

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

[View winners and all contenders](#)

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

**Practice Management Takeover with Maureen Wilke - Summer Client Acquisition Strategies Part 1** - Tuesday, June 6, 10:00am Pacific

[Learn more >](#)

**Redtail Essentials: Permissions and Privacy Options** - Thursday, June 8, 11:00am Pacific

[Learn more >](#)

**Not Your Average Custom Indexing: Win New Clients with Next Gen Tech + Service** - Thursday, June 8, 11:00am Pacific

[Learn more >](#)

**Cleaning Up Bad History** - Thursday, June 15, 11:00am Pacific

[Learn more >](#)

**Building Your Tech Stack - Intulse** - Tuesday, June 20, 10:00am Pacific

[Learn more >](#)

**Redtail Essentials: Documents** - Thursday, June 22, 11:00am Pacific

[Learn more >](#)

**Building Your Tech Stack - fpPathfinder** - Tuesday, June 27, 10:00am Pacific

[Learn more >](#)

**Exploring the CRM Mobile App** - Thursday, June 29, 11:00am Pacific

[Learn more >](#)

**Redtail Campaigns Overview Demo** - Every **First** and **Last** Monday of Month at 11:00am Pacific

**Redtail Speak Overview Demo** - Every Second Monday of Month at 11:00am Pacific

[Learn more >](#)

**Redtail Imaging 2.0 Overview Demo** - Every Third Monday of Month at 11:00am Pacific



[Learn more >](#)

**Redtail CRM Overview Demo** - Every Tuesday at 11:00am Pacific

[Learn more >](#)

**New User Intro** - Every Wednesday at 11:00am Pacific

[Learn more >](#)

Our webinars are free to users. Bookmark Redtail's **Upcoming Webinars** page or follow us on social media to stay up-to-date on our upcoming webinars. [Bookmark Orion's Events page here.](#)

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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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## More Advisor Resources from Orion

Looking for more ways to grow your business and deepen your advisor-client relationships? Sign up to stay up-to-date on the newest ways to grow and scale your business from Orion.

Sign up now!

## Access Redtail CRM anywhere



## Stay in touch!

**redtailtechnology.com** | 800-206-5030



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