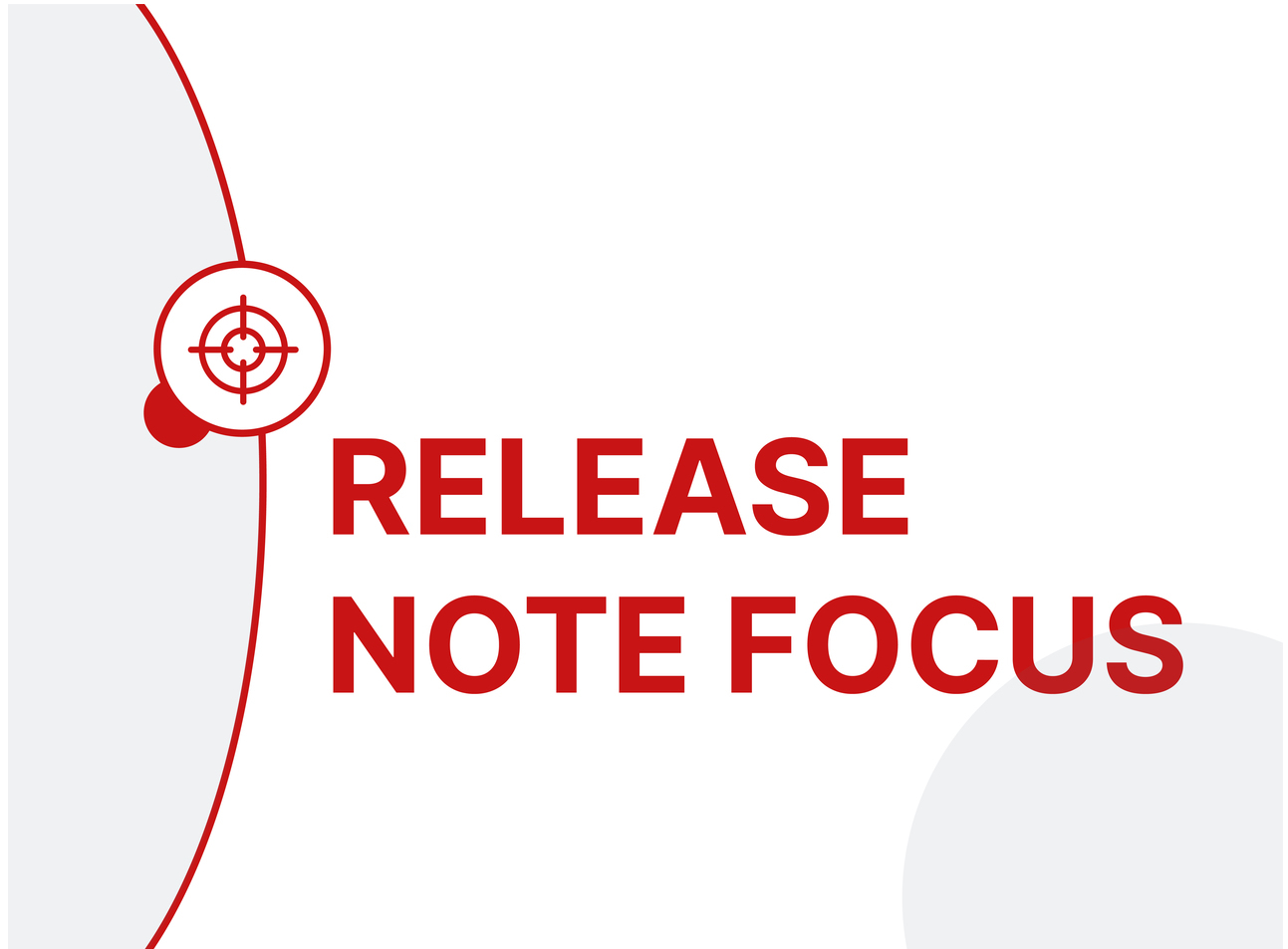


# Redtail News

September 2022



# RELEASE NOTE FOCUS

## Major enhancement to the Orion - Redtail integration

Last month we announced an efficiency-building enhancement to the integration between Redtail CRM and Orion Advisor Technology. If you have the Orion integration enabled within your CRM, Orion Portfolio View is now accessible on your Today page as well as at the client level on individual contact record's Accounts page.

[Learn more here](#)

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## What's new in Integrations?



**AllBackoffice** is dedicated to helping independent financial advisors, wealth managers, and fintech solution providers regain focus on the areas of business that they do best. They now offer a number of Redtail-specific services as well as serving as a first line of support for Redtail-related questions for those enlisting their services.

[Learn more >](#)



**Healthpilot** offers a platform for attracting and retaining Medicare-eligible clients. Our updated integration offers the ability to send an email referral to your client right from within Redtail. This email will include a link for your client to access the Healthpilot technology to select Medicare coverage.

[Learn more >](#)



**The Perfect RIA's** Toolkit provides advisors with proprietary value adds that Advisors can white label and use during their client meetings. This new integration offers the ability to sync your pertinent Household, Contact, Account, and Beneficiary data from Redtail CRM into the Invictus tool kit to allow easy generation of value adds for clients.

[Learn more >](#)



**TimeLyft's** Time & Productivity Management software helps Financial Advisors, as well as other client-based businesses, track time with clients to scale their business and improve

performance. This new integration allows you to import contacts along with any tasks linked to a contact from Redtail CRM into TimeLyft for a time analysis.

[Learn 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 or access more information now for the Redtail University events below. Registration for future events will open as we get closer to those dates.



Request Info on RTU Masters in Sacramento, CA



## 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 August 2022 installment of this series now:

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



**Baxter**

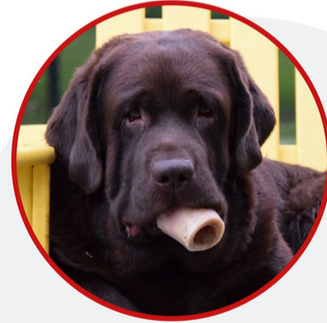
Ashley Coake  
Cultivate Financial Planning



**Banks and Yeti**

Amy Dresky  
Carolina Retirement Planners

RETAIL  
**Best Paw  
Forward**  
Photo Challenge



**Oakley**

Peter Edelstein  
Regent Financial Group, LLC

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

Baxter, Banks and Yeti, and Oakley are our August winners and will be featured on your CRM login pages for the month of September! Click below to see the winners and the other contenders from August. [Challenge details available here.](#)

[View winners and all contenders](#)

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

**Practice Management Takeover with Kate Guillen: Learn best practices for creating a repeatable task management system**

- Tuesday, September 6, 10:00am Pacific

[Learn more >](#)

**Orion + Redtail Part 2: Transforming Advisor Growth through Next Generation CRM Technology** - Wednesday, September 7,

12:00pm Pacific

[Learn more >](#)

**Ask a Trainer** - Thursday, September 8, 11:00am Pacific

[Learn more >](#)

**How To Handle Prospecting Series Part 1** - Thursday, September 15, 11:00am Pacific

[Learn more >](#)

**Building Your Tech Stack - Bento Engine** - Tuesday, September 20, 10:00am Pacific

[Learn more >](#)

**How To Handle Prospecting Series Part 2** - Thursday, September 22, 11:00am Pacific

[Learn more >](#)

**Building Your Tech Stack - BackNine** - Tuesday, September 27, 10:00am Pacific

[Learn more >](#)

**Redtail Essentials: Seminars** - Thursday, September 29, 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.

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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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## Access Redtail CRM anywhere



Stay in touch!

[redtailtechnology.com](http://redtailtechnology.com) | 800-206-5030



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