

Redtail News

April 2020

We Are All In This Together.

At Redtail, we are very fortunate to work in positions that allow us to continue doing the jobs we love, serving our advisor community

“Heroes are ordinary people who make themselves extraordinary.”

— GERARD WAY

while at the same time sheltering in place with our families at home. We are all too aware, though, that healthcare workers and others in essential services don't have that privilege right now. We are married to them; they are our brothers and sisters, our parents, our friends and sons and daughters. We are all affected by this, and we all must be there for one another, care for one another, laugh and cry with one another as we navigate through what, for now at least, is our new normal.

Rest assured that we are committed to being there for all of you; let us know if we can assist you in any way. We'd also like to point you toward [a blog post we posted on April 1](#) that includes some links to organizations that are dealing directly with the COVID-19 crisis and could use assistance from anyone who is able to make a donation.

Last but not least, we know many of you are going above and beyond to assist your clients and/or your community during this time when needs are so great across the board. If you or someone in your organization has a story that should be told, we'd love to hear it and potentially share with others as a future installment in our Advisor Hero series. [You can nominate Advisor Hero candidates here.](#)

Be kind, and be well, everyone!

What's New in the CRM?

March updates included [more flexibility with the Retriever Cloud syncing tool](#), [site navigation and client anniversary reminder updates](#), and [an area for Held Away Assets and new Reminder](#)



[Actions from your Dashboard](#), among other things. You can read more about those and our other recent updates to the CRM via our Release Notes [here](#).

What's New in Integrations?

[BackNine Insurance](#) simplifies the selling of life, long term care, disability, and annuities. Advisors signed up with their service can now launch BackNine's Quote & Apply eApplication software for contacts from within Redtail. [More details are available here.](#)



[fpPathfinder](#) is a financial planning tool aimed at helping diligent advisors ensure their client is on the right planning path. Their new integration with Redtail CRM allows advisors to launch and complete their Checklists that

cover a variety of common planning situations and then save those Checklists as a contact Note within Redtail for easy retrieval. [More details are available here.](#)

[Lead Pilot](#) offers solutions to help you increase traffic, connect with leads, and nurture prospects and clients. The integration with Redtail sends leads from your Lead Pilot



landing page subscribe form to Redtail as contacts. You can also set the integration up for Redtail contacts to be sent automatically into your Lead Pilot account. [More details are available here.](#)



[LoanBuddy](#) technology empowers financial advisors with tools and education to better serve clients with student loan debt. This integration with Redtail CRM allows

advisors to send client data to LoanBuddy and/or to sync new LoanBuddy prospects back into Redtail. [Learn more here.](#)

Upcoming Webinars

[Introducing Redtail Speak!](#): every Monday at 11:00 am Pacific

[Redtail Overview Demos](#): every Tuesday at 11:00 am Pacific

[30 Minute Quick Starts](#): every Wednesday at 11:00 am Pacific

Topical Webinars:

[Using Your CRM to Delight Your Clients with Redtail and SEI](#)

Tuesday, April 7, 10:00 am Pacific

[Workflow Series: Part 2 - Building Workflows in Redtail CRM](#)

Thursday, April 9, 11:00 am Pacific

[New Partner Spotlight - fpPathfinder](#)

Tuesday, April 14, 10:00 am Pacific

[Workflow Series: Part 3 - Live Application of Workflows](#)

Thursday, April 16, 11:00 am Pacific

[Best Practice Partner Webinar- Laserfiche](#)

Wednesday, April 22, 10:00 am Pacific

[Workflow Series: Part 4 - Enhancements / Automations](#)

Thursday, April 23, 11:00 am Pacific

[PreciseFP + Redtail: How to VIRTUALLY Be There for Your Clients](#)

Friday, April 24, 10:00 am Pacific

[Redtail Essentials: Opportunities](#)

Thursday, April 30, 11:00 am Pacific

Our webinars are *free* to users. You can see the [full schedule for upcoming webinars here](#) or use our Social links at the bottom of this newsletter to follow us for updates!



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