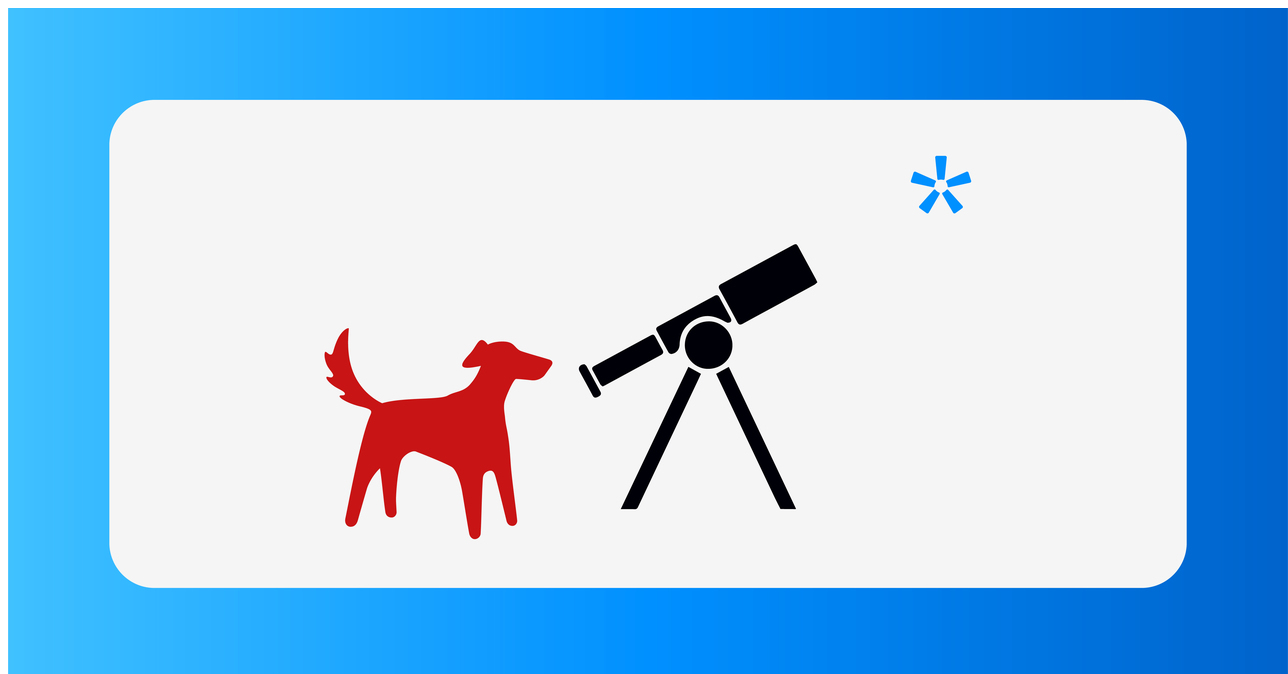


Redtail News

July 2023



Wealthtech News, Insights, and Awesome Content from the Orion Blog in June

- [How to Turn Compliance into a Profit Center for Your Firm](#)
- [Identifying Risk Tolerance Personas \(And How To Cater To Each One's Unique Needs\)](#)
- [How Portfolio Risk Analysis Can Transform Your Approach to Making Investment Decisions](#)
- [The Importance of Open Architecture: How to Implement Your Ideal Tech Stack](#)

- [From Silos to Synergy: Why Financial Advisors Should Prioritize a Tightly Integrated Tech Stack](#)

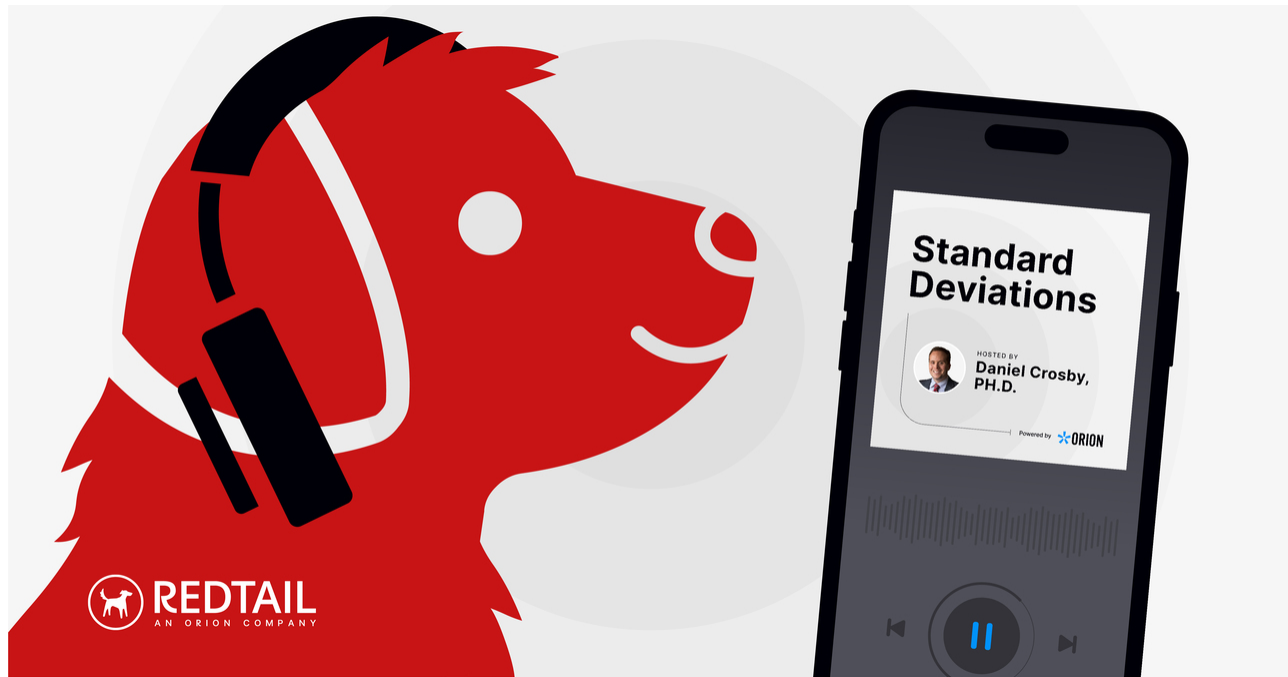
See all posts



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



Fuel your journey with these recent Orion podcast episodes

Across Orion's family of podcasts, each month you'll find a ton of great audio content to inform, inspire, and/or delight you on your journey as an advisor. We invite you to check out what's been up for discussion on recent episodes today.

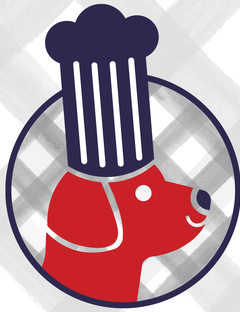
Orion Podcasts – June 2023



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](#)

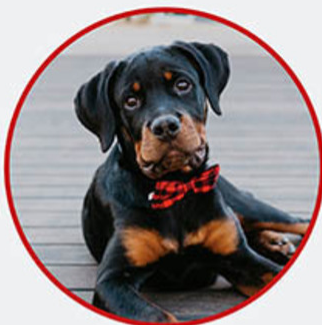
[Minneapolis registration](#)

[Nashville registration](#)

Have you visited Orion Advisor Academy?

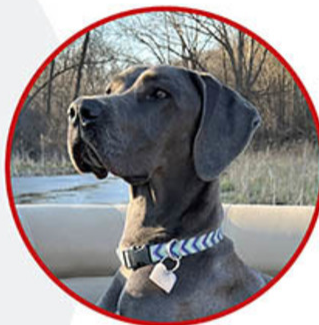
Built on the research and insights of Dr. Daniel Crosby, [Orion Advisor Academy](#) is designed to help you achieve your CE requirements with weekly reporting to CFP and IWI, *all at no cost to you*. Orion Advisor Academy provides practical education in the four pillars of the [Orion Fiduciary Flywheel](#):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

Visit the Academy now!



Chico

Emilia Lerma
SMA Wealth Management



Abby

Christina Cyrulewski
H&A Advanced Business Partners



Bravo

Juliette Ailes
West Michigan Advisors

REDTAIL
Best Paw Forward
Photo Challenge

Redtail's Best Paw Forward Photo Challenge June winners

Chico, Abby and Bravo 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 Redtail >](#) [view all Orion >](#)

Understand Risk, Uncover Opportunity - Tuesday, July 11, 9:00am
Pacific

[Learn more >](#)

Practice Management Takeover with Maureen Wilke - Summer Client Acquisition Strategies Part 2 - Tuesday, July 11, 10:00am
Pacific

[Learn more >](#)

Orion Compliance Demo and Q and A - Wednesday, July 12, 9:00am
Pacific

[Learn more >](#)

AI and Automation Summit for Financial Advisors - Wednesday,
July 12, 11:00am Pacific

[Learn more >](#)

How to Handle Prospecting – Part 2 - Thursday, July 13, 11:00am
Pacific

[Learn more >](#)

Building Your Tech Stack - PreciseFP - Tuesday, July 18, 10:00am
Pacific

[Learn more >](#)

Building Your Tech Stack - Orion - Tuesday, July 18, 12:00pm Pacific

[Learn more >](#)

Redtail Essentials: Seminars - Thursday, July 20, 11:00am Pacific

[Learn more >](#)

How to Handle Multiple Advisors - Thursday, July 27, 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.](#)

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](#)

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!](#)

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1810-OAT-7/7/2023

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