

Redtail News

February 2022

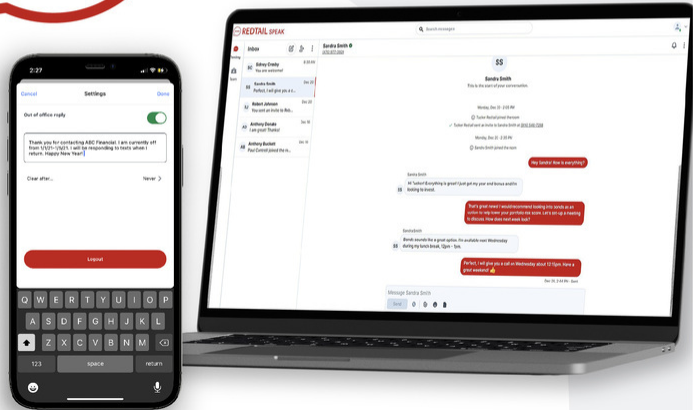


Add your voice to the 2022 T3 Survey!

The annual Technology Tools for Today survey produced by Joel Bruckenstein and Bob Veres dives deep into fintech solutions and the satisfaction levels of the advisors who use them. The T3 Software Survey is always valuable to us as it provides insight both into what we might be doing better for you as well as into which new solutions in the industry we should be integrating with (if we haven't already).

[Take the T3 Survey](#)

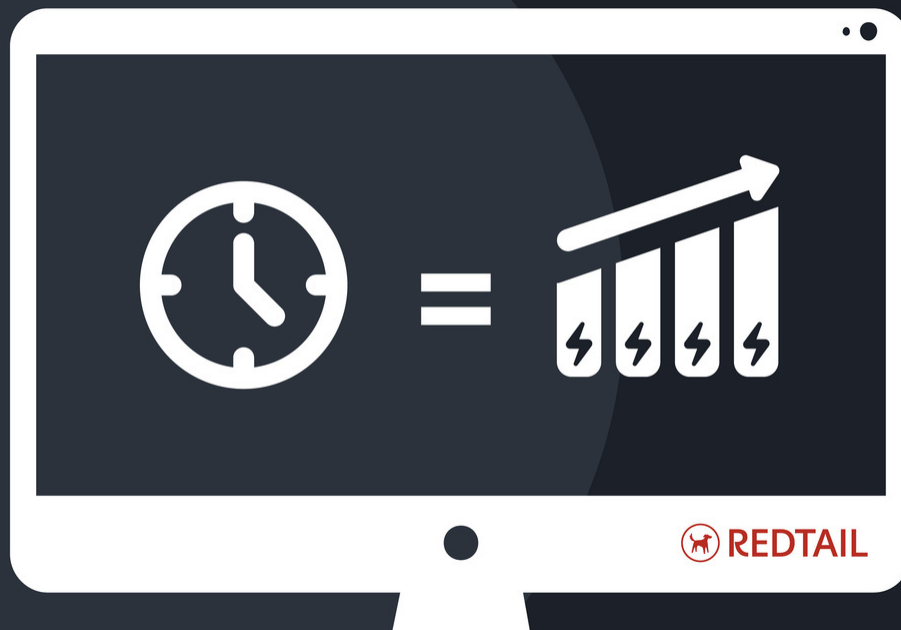
Compliant Texting for Financial Advisors



Redtail Speak is all new in 2022!

If you missed the news, we recently announced a brand-new version of Redtail Speak, a compliant way for you to text message your clients and collaborate with your staff in real-time! Also, Speak is now available as a standalone texting/chat solution, while offering integration with Redtail CRM for those who subscribe to both solutions.

[Learn more about Redtail Speak](#)



Moore's Law may be slowing down but wealthtech's just getting started

Redtail CEO Brian McLaughlin recently penned an Opinions piece for *Financial Planning* where he considers how fintech might continue to find ways to further advisor growth and efficiencies through technology, even as some of the coattail effects all industries have benefitted from due to Moore's Law begin to shorten over time.

[Read it 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 event below. Registration for future events will open as we get closer to those dates.



Atlanta, GA 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 January 2022 installment of this series now:

[Manage your CRM: Manage your Integrations](#)

What's new in Integrations?



Healthpilot is a platform for attracting and retaining Medicare-eligible clients. This new integration between Healthpilot and Redtail allows Redtail users to upload clients into the Healthpilot portal to facilitate quick and easy referrals for clients to access the Healthpilot Medicare enrollment platform.

[**Learn more >**](#)



Louise is a modern charitable giving platform that empowers advisors and families to give, grow and

grant in new ways. This new integration allows Louise by TIFIN users to import their Redtail CRM contacts into their Louise account.

[Learn more >](#)



River
Denise Procaccino
Chadwick Financial



Sammy
AiRung Liu
High Valley Financial
Planning Services



Amber
Susan Osnayo
Strive Financial

Redtail's Best Paw Forward Photo Challenge

January winners

River, Sammy, and Amber are our January winners and will be featured on your CRM login pages for the month of February! Click below to see the winners and the other contenders from January. [Challenge details available here.](#)

[View winners and all contenders](#)

Upcoming webinars [view all >](#)

How To Prepare for Client Reviews - Thursday, February 3, 11:00am

Pacific

[Learn more >](#)

Practice Management Takeover with Peter Montoya - Tuesday,

February 8, 10:00am Pacific

[Learn more >](#)

Tag Groups vs Keywords vs UDFs - Thursday, February 10, 11:00am

Pacific

[Learn more >](#)

Redtail Essentials: Integrations - Thursday, February 17, 11:00am

Pacific

[Learn more >](#)

Building Your Tech Stack - Louise by TIFIN - Tuesday, February 22,

10:00am Pacific

[Learn more >](#)

How to Handle Cancelled Appointments - Thursday, February 24,

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 (either virtually or in-person) - we'd love to connect with you if you're in attendance as well.

[View upcoming conferences](#)

Access Redtail CRM anywhere



Stay in touch!

redtailtechnology.com | 800-206-5030



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