

# The Financial Professional's Best Friend



**Redtail CRM** is cloud-based, easy to use, quick to deploy and delivers a rapid return on investment. Integrating with all the most highly-regarded financial apps, Redtail is delivered as an affordable monthly subscription, and makes the financial professional's life easier with automated workflows, calendars and contact management.



**Redtail Imaging** provides a powerful option for managing and archiving documents from any location on any computer.



**Redtail Email** provides financial professionals with a convenient and compliant way to retain, retrieve and report on email correspondence.



**Redtail Speak** Redtail's collaborative communication platform for advisors and staff, is free with every Redtail CRM subscription, and provides advisory offices with a baked-in chat solution that is archived, searchable, and tied to contact records where applicable.



**That famous Redtail service.** You will never be charged to speak with one of our calm and collected knowledge ninjas, and we offer free webinars, extensive online help docs and the ever-popular traveling Redtail University.

✔ **Over 16 years of experience** providing CRM solutions to the financial services industry.

✔ **Free 30-day trial.**

✔ **Free database conversion,** 1:1 support, plus world-class training.

✔ Customizable solutions.

✔ **Over 100 integrations** with the most widely-used tools in financial services.

✔ **Tablet-friendly,** with a free mobile app for our CRM.

✔ **Low month-to-month** subscription.



(800) 206-5030

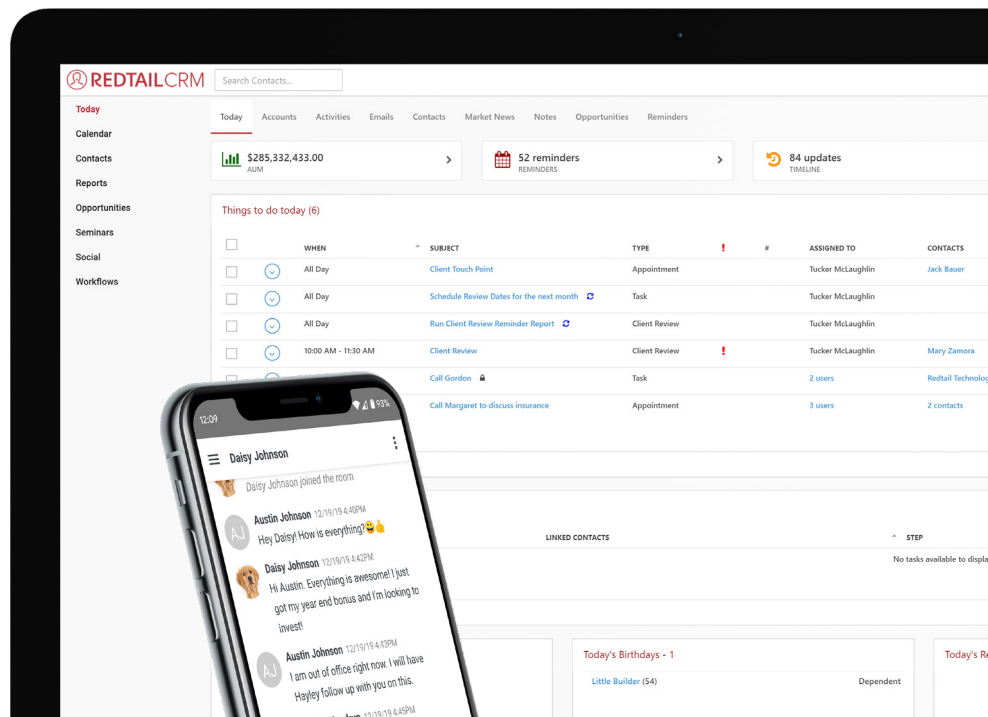
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**Redtail CRM is cost-effective, easy and tailored to today's financial pro.** Unlike other CRM solutions, it's priced per database, allowing up to 15 users, all for the same low monthly subscription.

**It's all about integrations.** You will see services like Morningstar, Riskalyze, LaserApp, Allbridge and MoneyGuidePro seamlessly within Redtail CRM. Customization to your office is available.

**Disaster-proof.** Your data is backed up to a secure, offsite location every night, and always available wherever you are.

**FREE database conversions.** Switching CRM providers should be easy, so we provide complimentary database imports from nearly every major solution provider. Just activate your first month's subscription and we will work with you to get your data converted and ready to go!

**"Know your client."** Track everything from allocation model preferences to bank information to health stats in one place. Detailed tracking of your clients' data provides more inroads for relevant client "touches."

**Categorize and tag client records** for easy retrieval, bulk edits and/or niche-based marketing campaigns.

**Reports.** With a wide array of client and account reports at your fingertips, you'll quickly get at the information you need.

**Custom exporting.** In addition to the modern reports available within Redtail, you can also create exports based on the data you need at any given time.

**The automated office.** Workflows streamline by generating and tracking activities, while reminders alert you to events like client birthdays, anniversaries and reviews.

**Seminar management.** Plan and manage your seminars and events from within Redtail CRM, with better seminar reporting than ever!

**Broadcast emails.** Send bulk messages and attachments to specific groups of clients or prospects.

**Document management.** Upload, store, categorize and link electronic versions of documents to client accounts.

**Broker dealer/group deals.** Be sure to ask if you qualify for any of our discounts!



**100% email retention.** All messaging that you receive or send through your mailbox is automatically archived into two separate data stores to provide complete archive redundancy.

**Redtail CRM integration.** Users of Redtail CRM auto-matically have their email correspondence dynamically linked to client records. This provides a simple interface to view all email activity to and from any client with a single click.

**No storage limits.** There are no storage limits on mailboxes and no archive restrictions—so you can keep all of your correspondence for as long as you like.

**Meet and exceed SEC/FINRA regulations.** Specifically built to meet email archiving regulations from SEC Rule 240 (17a-3 and 17a-4).

**POP3 or IMAP accounts.** Redtail Email allows flexible use of email accounts. The available IMAP interface provides server-based folders attached to your mailbox, which allows you to access all emails in all subfolders from any computer with internet access.

**MAPI accounts.** Using the Zimbra Connector for Outlook (ZCO), you can set your email account up within Outlook as a MAPI account, which will provide you with greater functionality. The MAPI protocol allows you to sync not only email but calendars and contacts as well.

**Webmail Client.** Redtail's Email Hosting Service allows you to access your email from anywhere as long as you have an internet connection. Meaning you don't have to be on a computer or device where your email account is set up on Outlook, Thunderbird, etc.

**Anti-virus and spam protection.** Every email account is equipped with a complete anti-virus and spam blocker package to eliminate any email-based virus attacks and reduce inbound spam and phishing messages.



**Redtail CRM Integration.** Users of Redtail CRM can link client folders in Redtail Imaging to a client's documents area within Redtail CRM. This provides users with quick, easy access to all of a client's Imaging files from directly within Redtail CRM.

**Image Access.** Using predefined folders in each user's isolated storage, we offer full access to archived images.

**Image retention policy.** Providing a zero-loss, no-time-limit retention policy to guarantee the complete retention of images, regardless of time.

**Audit trails.** Building and maintaining a complete audit trail of all interactions between the user and the system, including dates, times, IP Addresses, image locations and image actions.

**Off-site archives.** As part of the Redtail Imaging Disaster and Storage Redundancy Plan, we have contractual agreements with two geographically diverse Class A data centers, in Sacramento, California and Phoenix, Arizona.

**Backup.** Backups of archived images can be easily accessed to recover lost data in the event of an emergency.

**Security.** All communications between the client browser and the Redtail Imaging servers are transmitted using the latest 128-bit SSL encryption.

**WORM storage.** Redtail Imaging meets the SEC 17a-(4) Record Retention requirements by automatically burning all additions and changes by users to WORM media.



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