



REDTAIL

work **smarter.**



The Leaders Group and Redtail Technology are excited to announce a new partnership!*

Our agreement provides the following through The Leaders Group for:

- \$65/CRM for 15 users (normally \$99)**
- \$45/Imaging for 10 Gb (normally \$49)**
- \$65/Speak (normally \$79)**
- FREE Mobile App!**

- Month-to-month subscription
- Free 30-day trial
- Free database conversion
- Free training and one-on-one support
- Seamless integration with top names like Morningstar, Albridge Solutions, MoneyGuidePro, Laser App Software
- Tailored specifically for financial professionals for over 15 years
- Customizable solutions
- Tablet-friendly, plus free smartphone app for our CRM

TO SIGN UP:

Go to RedtailTechnology.com and sign up for the free trial.

TO ACTIVATE:

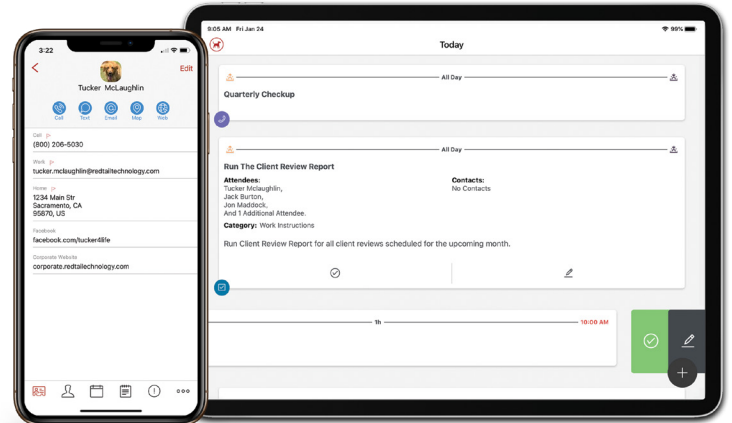
Enter Promo Code -

LGCRM CRM

LGIMG Imaging

LGSPEAK Speak

for the rates listed above.



Work smarter with your Redtail discount.

Unlike more generic solutions, Redtail CRM was conceived, developed and released specifically for the financial professional. Backed by responsive, cutting-edge technology—over 15 years' experience in the financial services software industry—Redtail is easy to use, quick to deploy and delivers a rapid return on investment.

One of the most cost-effective CRMs available, Redtail CRM is priced per database rather than per user. Each database comes with the ability to add up to 15 named users with unique usernames and passwords for one low monthly subscription. Redtail integrates with Morningstar, Albridge and Laser App as well as many other popular applications used in the industry—and is customizable to your office's specific needs.

800.206.5030

redtailtechnology.com

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In addition to the suggested roadmap below, the question mark in the top, right-hand corner of your CRM is your best friend! Click on this icon to submit a help ticket, access our help desk, suggest a feature or enhancement and more!

- 1 Get acclimated** with your CRM by watching the Redtail CRM Overview Demo. This is our most popular webinar, a flyby of the CRM system showing you the ins and outs of the product.
 - Access a live schedule [HERE](#) (the Overview Demo is every Tuesday)
 - Find a recorded version of the demo [HERE](#)
- 2 NEW USER CHECKLIST!** Redtail CRM is coded to function in a certain way, i.e. pulling primary addresses and designating a head of household. Get to know things you should know by day 1, day 2 or on an ongoing basis with this checklist [HERE](#).
- 3 Brush up on some of the most day-to-day to functions of the CRM.** You can check out the following [Getting Started](#) series of videos:
 - [Navigation, Users & Teams](#)
 - [Site Preferences & Integrations](#)
 - [Database Lists & The Contact Record](#)
 - [Resources](#)
 - [Calendar & Activities](#)
- 4 Learn best practices** for relationship linking, client segmentation, planning to-do's or tracking history with the Redtail: First Steps Guide. Check out other recommendations [HERE](#).
- 5 You'll want to schedule yourself for continued education webinars** [HERE](#) whenever you see a topic that you find interesting on our schedule. Trainings occur every Thursday at 11am PST and after you take notes throughout you can ask a live trainer questions at the end. We record all of these topical sessions and put them in our webinar library for you to check out [HERE](#).

Note: If you're not a video person, we suggest you bookmark help.redtailtechnology.com. After you select the Project Tailwag tile, [HERE](#) you will find documentation with screenshots on actions you'll perform in the CRM. You'll also find a search bar in the top-right—for example, if you want to quickly search, “Is there a way to run mail merges in Redtail?” you can find step-by-step help immediately!

If you have any questions, please don't hesitate to call us at

800.206.5030 option 2 for Sales

800.206.5030 option 3 for Support.

800.206.5030

redtailtechnology.com

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