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Redtail Technology delivers web-based Client Relationship Management (CRM) solutions for the financial professional. This is not your typical off-the-shelf CRM solution, rather one designed from the ground up to meet the challenging needs of financial advisors. Unlike traditional CRM solutions, Redtail CRM, is easy to use, quick to deploy and delivers a rapid return on investment.

Successful financial professionals depend on creating and maintaining long-lasting relationships with clients. And that is what Redtail CRM helps financial professionals do. They do it with online CRM tools for client management, sales automation, client support and marketing automation. Powerful tools, seamlessly integrated. Redtail is an integrated technology company.

Because Redtail CRM is delivered as a subscription service, financial professionals are able to focus on growing their business instead of managing software technology.

Unique Features

- Web Based:
 - Redtail manages your software for you;
 - No networking is needed for multiple users;
 - Work from anywhere there is an internet connection;
 - Redtail stores your Data in two secure locations.
- No upfront costs or yearly contract.
- Support is included.
- Integrations:
 - Laser App
 - Albridge
 - Money Guide Pro
 - DocuPace

The Redtail CRM solutions offer:

Rapid Deployment

No software. No hardware. Nothing to install.

Flexibility

Robust and flexible set of features to meet your unique needs.

Scalability

Durable, high-performance platform for all environments

For live and recorded overview demos, go to [REDTAIL CRM, Imaging & Email Archiving Demos](#).