Moneytree Plan
Integration Guide

REDTAIL

Moneytree Plan features the ability to import client and asset information from several different integration partners. This guide will showcase the integration with Redtail as an example. The Redtail integration allows you to access your Redtail client data in Moneytree Plan to streamline your process for creating financial plans.

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Access Redtail Client Data

Streamline Your Planning

Using Moneytree Plan's integration with Redtail, advisors can quickly and easily access current asset information to jump-start data entry for creating or updating financial plans. Advisors can now seamlessly access Redtail client data, including:

- Account Information
- Balances
- Positions

REDTAIL

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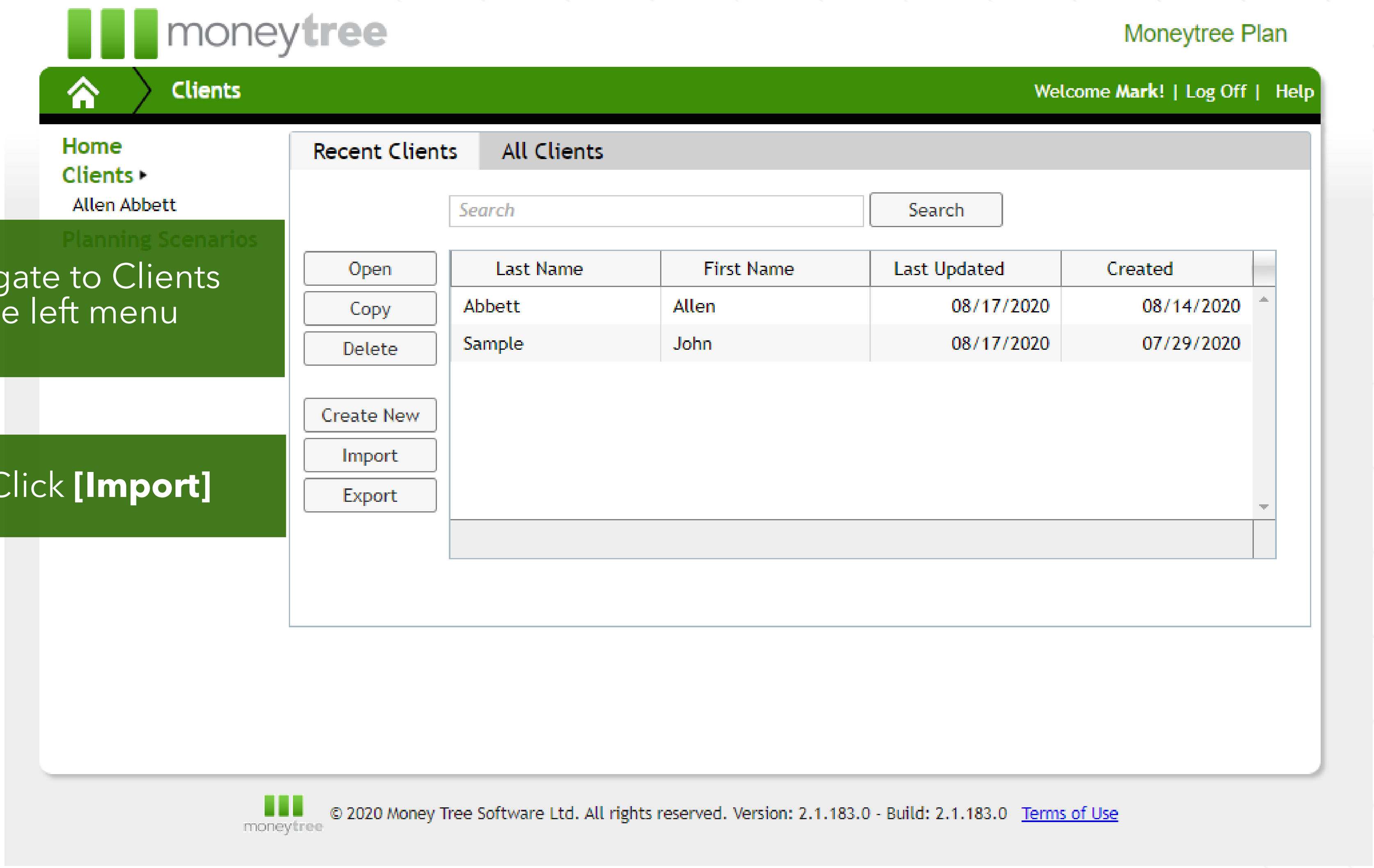
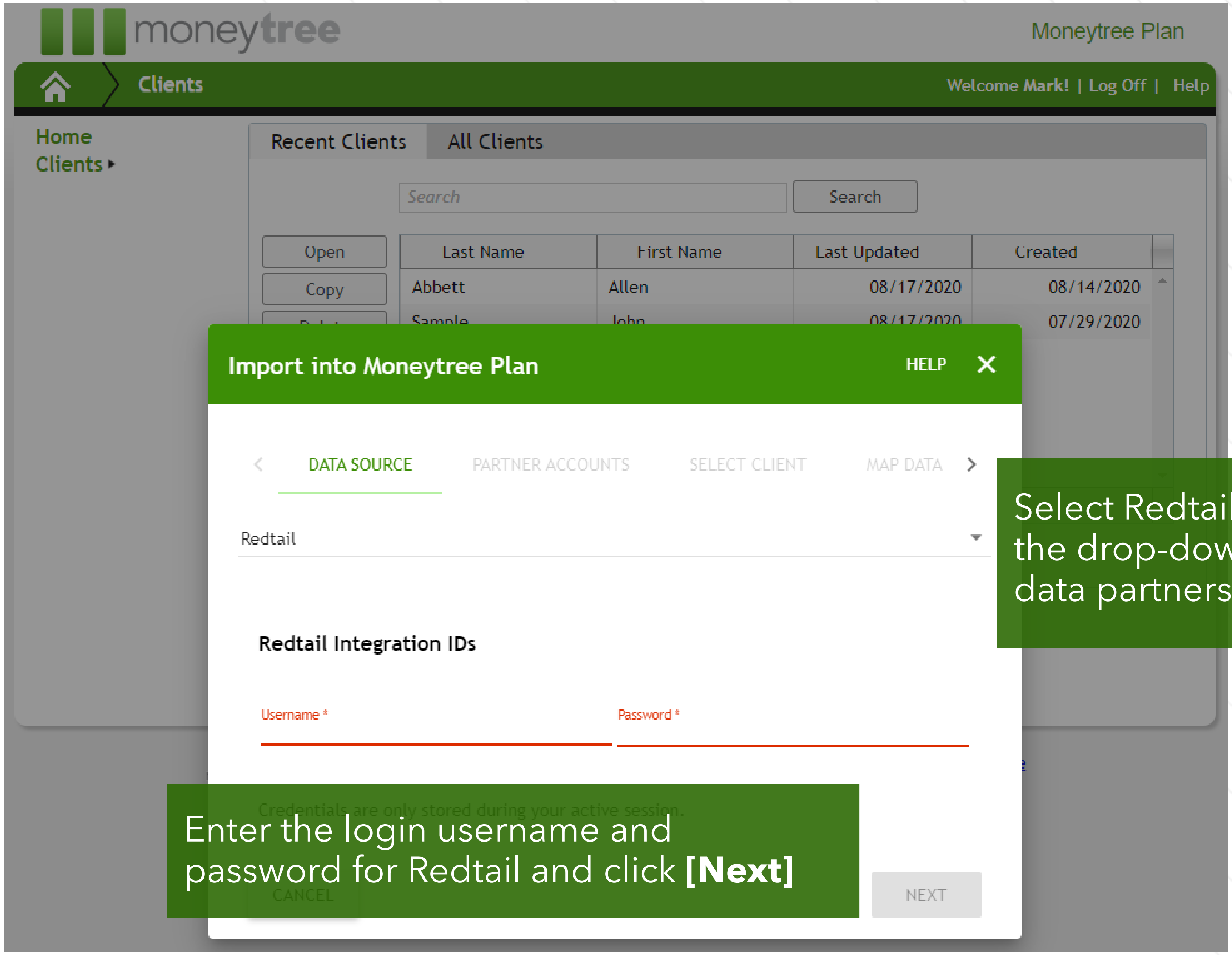
Integration Walkthrough



Navigate to Clients on the left menu

Click **[Import]**

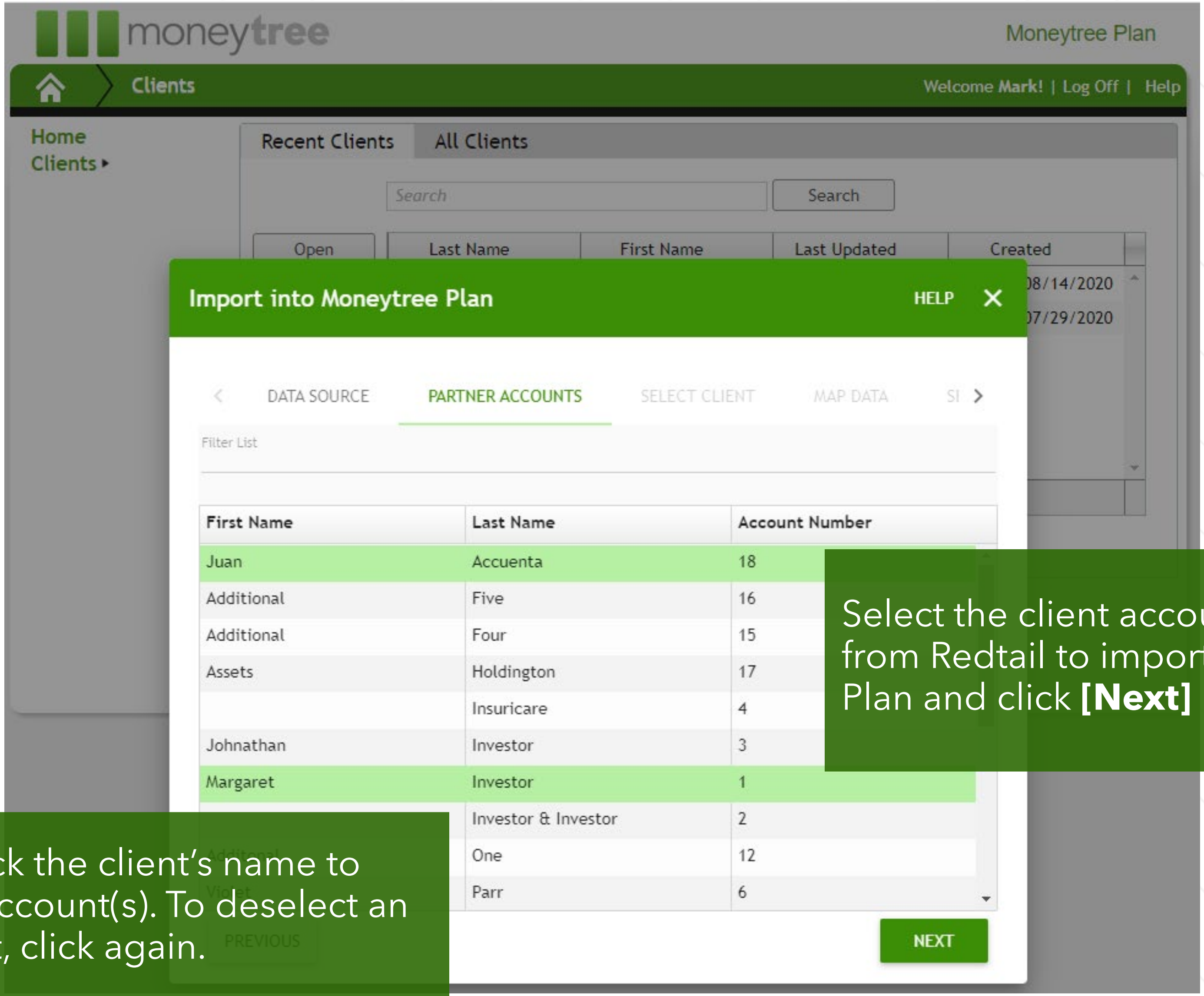
Step 1. Data Source



Select Redtail from the drop-down list of data partners

Enter the login username and password for Redtail and click **[Next]**

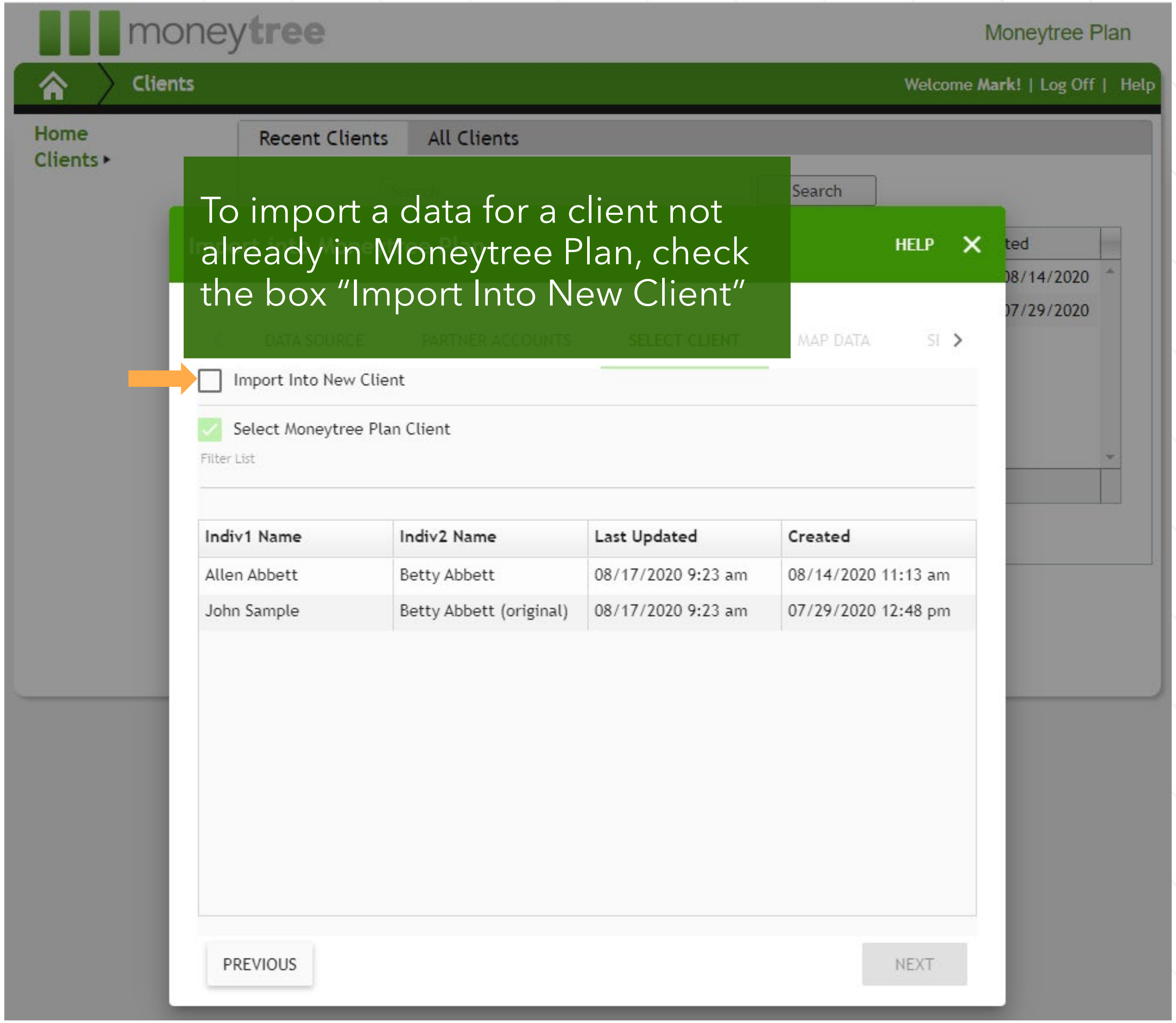
Step 2. Partner Accounts



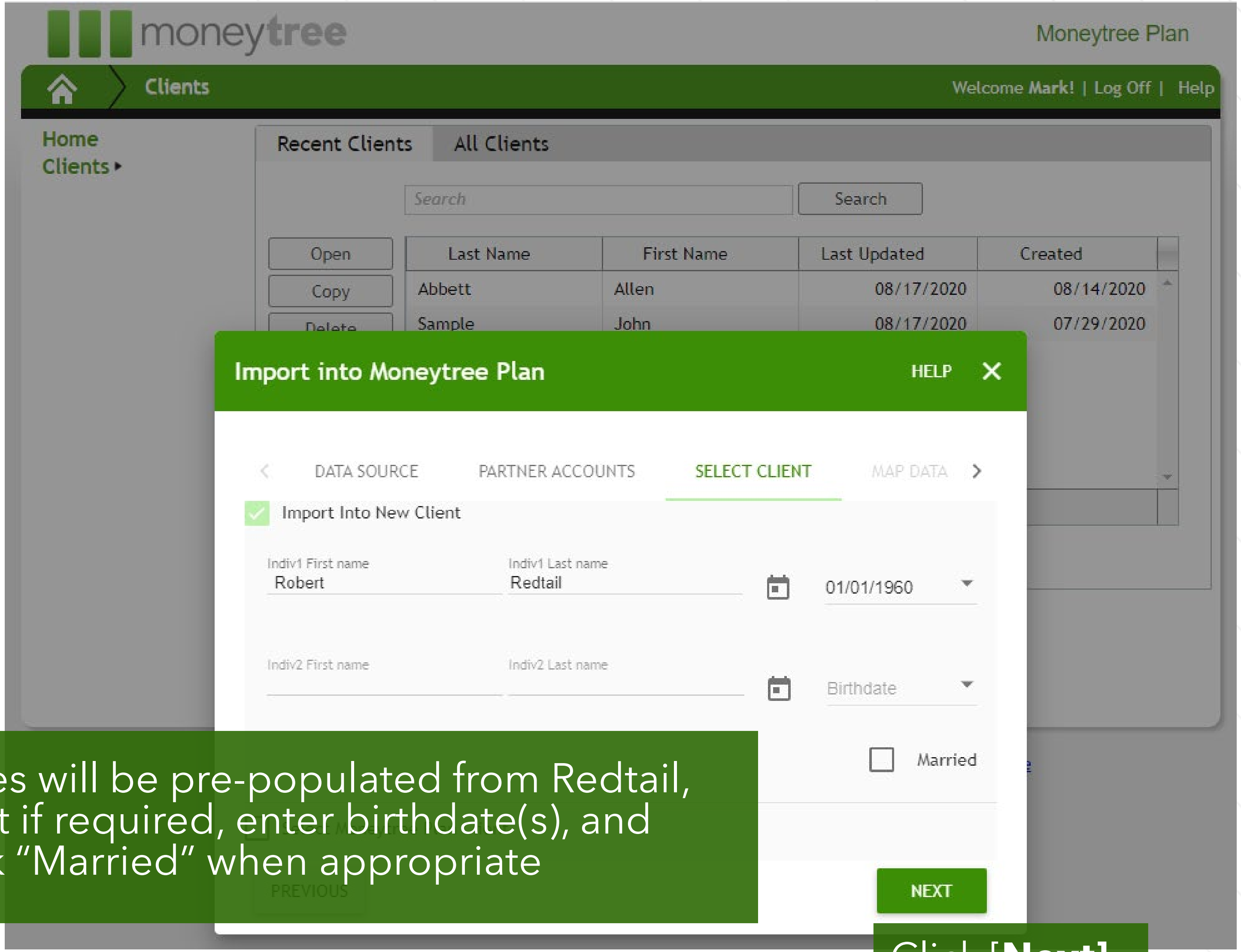
Select the client account(s) from Redtail to import into Plan and click **[Next]**

Tip: Click the client's name to select account(s). To deselect an account, click again.

Step 3. Select Client (Import Into New Client)



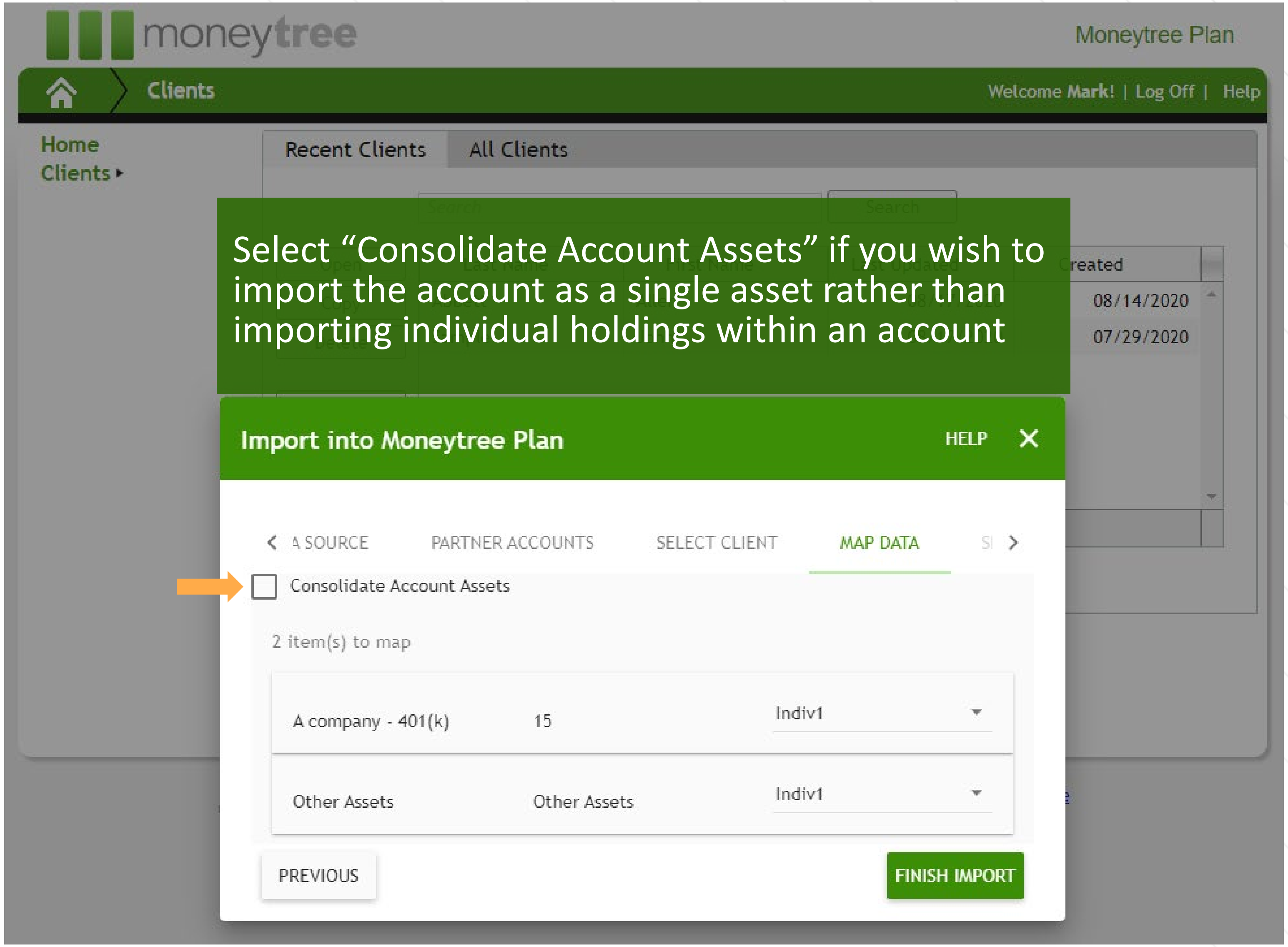
Step 4. Select Client, part 2 (Import Into New Client)



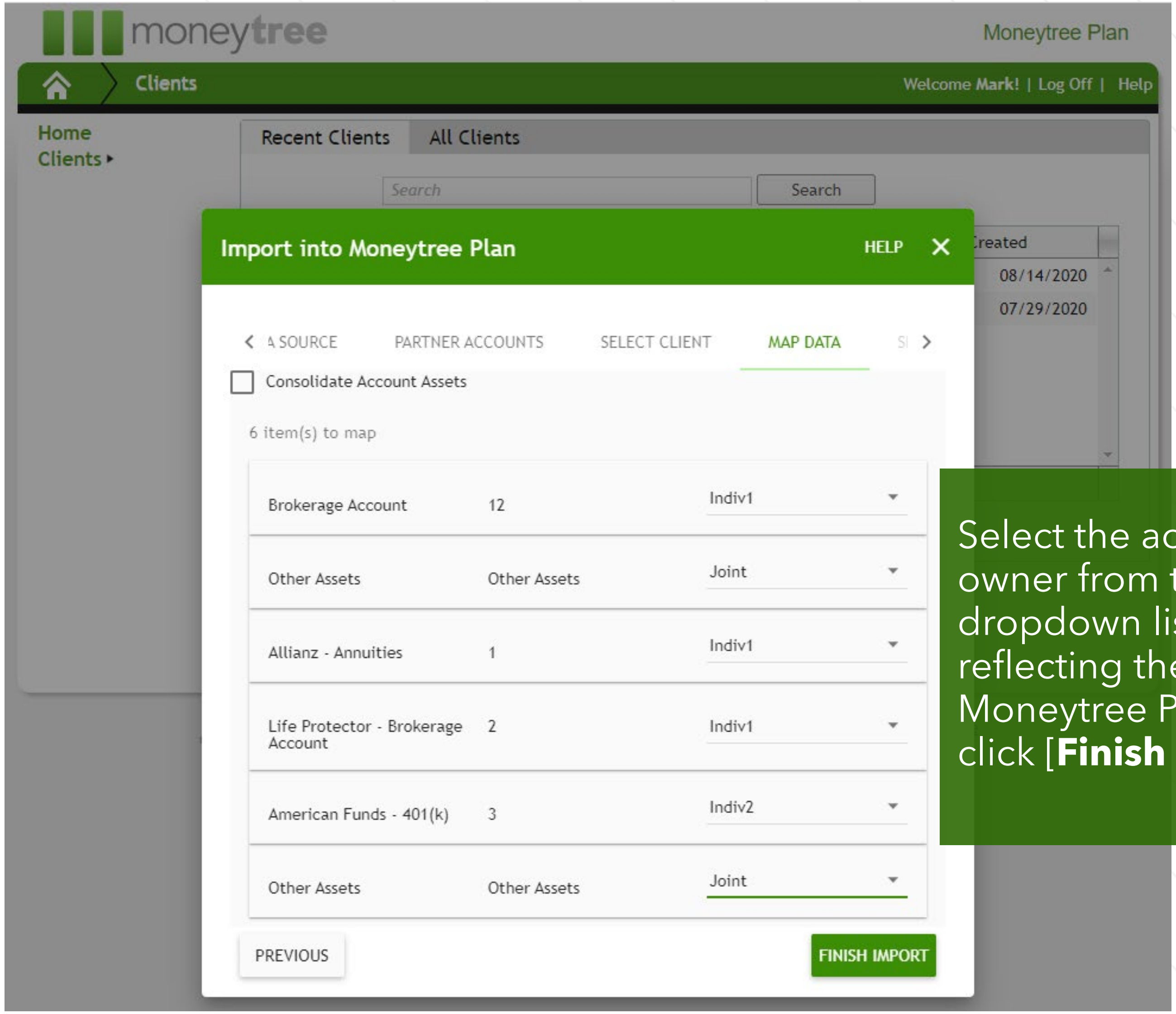
Names will be pre-populated from Redtail, adjust if required, enter birthdate(s), and check "Married" when appropriate

Click [**Next**]

Step 5. Map Data (Consolidate Account Option)

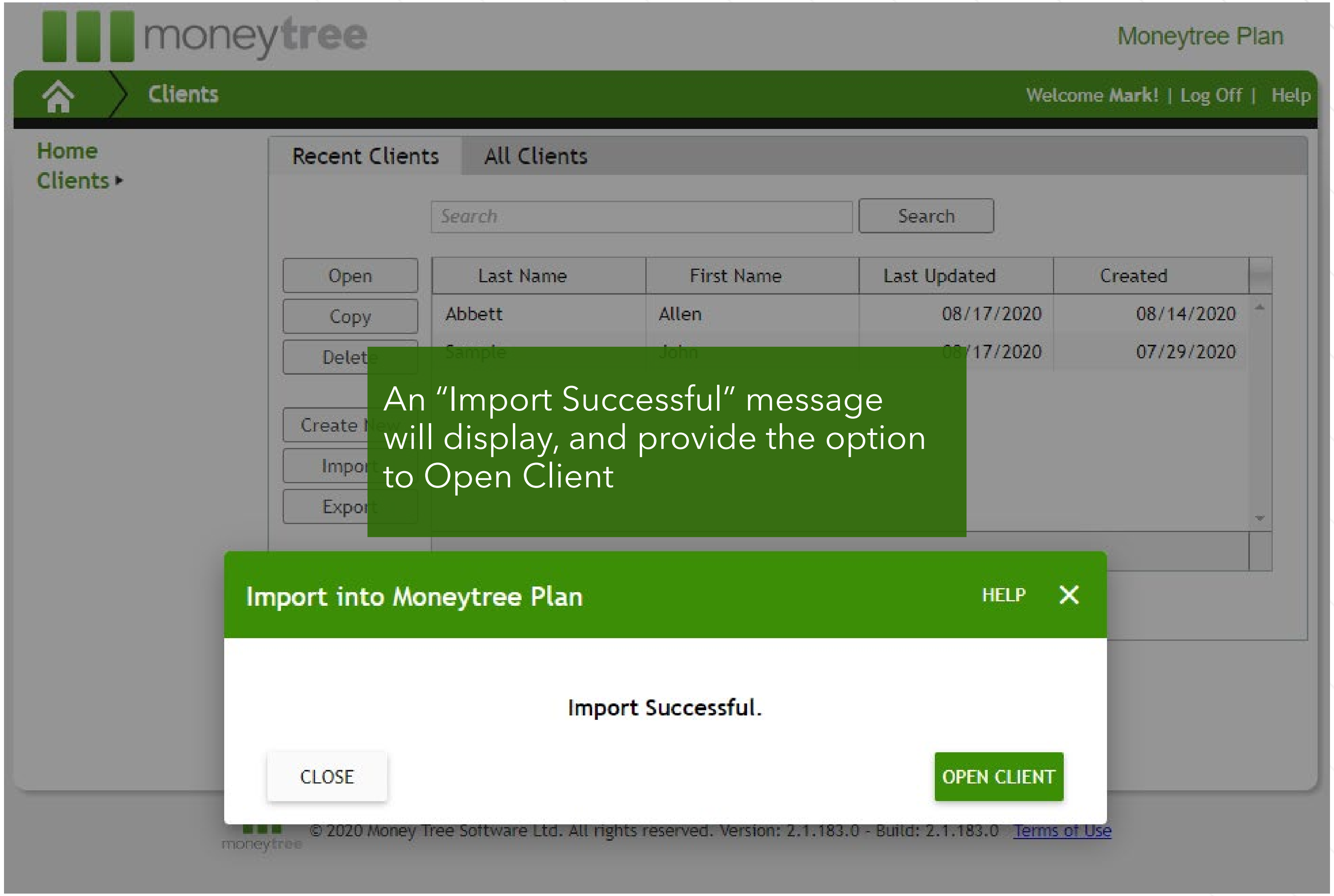


Step 6. Map Data (Account Owner)



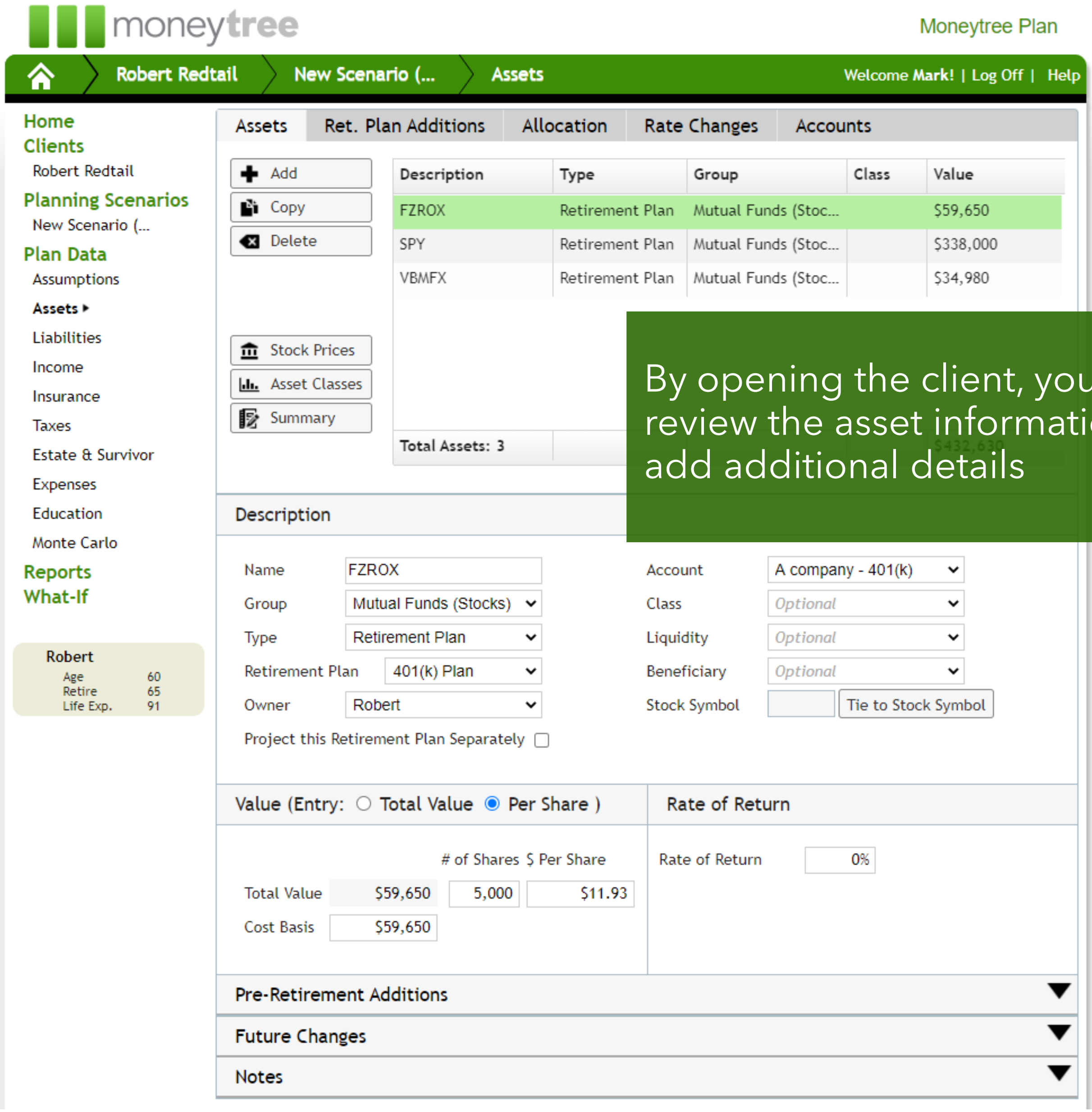
Select the account owner from the dropdown list reflecting the Moneytree Plan and click [**Finish Import**]

Step 7. Open imported client



An “Import Successful” message will display, and provide the option to Open Client

Step 8. Review data



By opening the client, you can review the asset information and add additional details

Need assistance? Contact our client support team.

moneytree.com/support-center

877-421-9815

Find additional resources and articles:

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About Moneytree Software and Redtail Technology, Inc.

About Moneytree Software

Moneytree Software offers multiple financial planning solutions to address the unique and varying needs of advisors and their clients. For advisors seeking an easy and effective planning solution, Moneytree Advise provides engaging big-picture planning. For advisors needing a powerful and flexible solution, Moneytree Plan provides fine-tuned planning with the unique ability to create goal-based and cash flow-based reports, allowing advisors to plan for any client situation.

Contact Moneytree Software

- Email: support@moneytree.com
- Phone: (877) 421-9815

About Redtail Technology, Inc.

Redtail Technology is a leading provider of web-based Client Relationship Management (CRM), paperless office, and email archiving solutions, in the financial services industry. Easily affordable, easy to implement, and offering integration with many of the industry's most widely used applications. Redtail is committed to providing financial advisors with the core technologies that drive their day-to-day operations.

Contact Redtail

- Website: www.redtailtechnology.com
- Phone: (800) 206-5030

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