

REDTAIL IS NOW FULLY INTEGRATED ON THE TCA PLATFORM

*An easy and cost-efficient way to automate client account
management*



Redtail, one of the leading providers of customer relationship management (CRM) software in the independent advisory industry, is now integrated with the Trust Company of America (TCA) platform. Now you can set up your TCA shell accounts using the Redtail Tailwag CRM tool.

The Redtail/TCA integration enables:

- Real-time, seamless and secure data transfers from TCA to Redtail.
- Time savings gained by no longer having to enter client information into multiple systems.
- Expedited account opening by using Redtail to set up a shell account on Liberty at TCA.
- Cost savings by using the TCA discount pricing.

If you would like more information or are interested in setting up your real-time integration between TCA and Redtail, please contact your TCA Relationship Manager.