TCA's integration with Redtail helps you more easily automate your CRM

The TCA integration with Redtail makes client account management even easier. You can open a new account with just a couple of clicks. You can have all your client data automatically synched with your CRM tool for quicker access. And you'll no longer have to re-key client data into multiple systems.

The TCA/Redtail integration enables real-time account data and transactions directly into the Redtail CRM, resulting in advisors having quick access to account information and services to empower more efficient client service.

The Redtail/TCA integration enables:

- Real-time, seamless and secure data transfers from TCA to Redtail.
- Account Positions, Account Balance, and Transaction History for all TCA accounts now display in Redtail *in real time*, providing more current information.
- Time savings gained by no longer having to enter client information into multiple systems.
- Easy account opening, using Redtail to open a client account at TCA.
- Access to up-to-the-minute positions, balances and transactions from TCA on Redtail.
- Cost savings by using the TCA discount pricing.

Using Redtail to open new shell accounts at TCA will have full functionality, including…

- Multiple models
- Fee Families and individual fee schedules
- Beneficiaries
- Representatives (to follow soon)
- E-Signature (to follow soon)

Please complete the *Third Party Integration Request* so we can enhance your Redtail experience, as well as provide you the *Pricing Discount Summary*.

If you have any questions or want to see a demo of these new features, please contact your relationship manager.