



IPS AdvisorPro® and Redtail Integrate Technology Systems

~ New data integration streamlines development of Investment Policy Statements

Miami, FL – May 24, 2011. IPS AdvisorPro® and Redtail Technology announced today the availability of a new data integration between their industry leading technology platforms for financial advisors. The new integration will streamline the preparation of Investment Policy Statements (IPS) by automatically populating IPS AdvisorPro® fields with client information contained in Redtail's CRM solution.

"As practicing financial advisors ourselves, we know how important it is to automate and simplify back office activities," said Linda Lubitz Boone, CFP® and Norm Boone, CFP®, co-founders of IPS AdvisorPro®. "This new integration will save advisors time and effort in developing IPSs for their clients, while ensuring consistency of client information between the two systems."

Advisors using IPS AdvisorPro® will be able to automatically import client specific data from Redtail such as investor name, address, phone number, email address and other information as well as specific account details such as account number, value and title, significantly streamlining the data entry process.

IPS AdvisorPro® is built on the industry's latest technology, capturing the many benefits of providing a secure, online tool that advisors can access any time and anywhere they have an Internet connection. Powerful customization tools provide advisors the flexibility and functionality to tailor their IPSs to their client's individual situation. Additionally, if firms need to change or update their investment process or methodology, they can simply make those changes, and with one click, automatically update all IPSs across the firm.

Redtail Technology delivers web-based Client Relationship Management (CRM) solutions for the financial professional with online CRM tools for client management, client support and sales and marketing automation.

"We are strong proponents of technology integration and are very excited to partner with IPS AdvisorPro®," said Brian McLaughlin, CEO and President of Redtail Technology. "IPS AdvisorPro® is the leading platform for creating and managing IPS documents in the industry and this integration will enhance the value of both systems for our common clients."

Both IPS AdvisorPro® and Redtail Technology are founding members of “Your Silver Bullet” (www.yoursilverbullet.com) the industry consortium dedicated to facilitating integrations among third-party software providers.

About IPS AdvisorPro®

Created by financial advisors for financial advisors, IPS AdvisorPro® is designed to work with all types of wealth management professionals and their practices. IPS AdvisorPro® offers a flexible solution to creating and managing Investment Policy Statements that are easy to use through an encrypted, secure web-based environment. With over 1,400 users and over 30,000 IPSs created, IPS AdvisorPro® is the industry’s leading technology solution. IPS AdvisorPro® was named in 2006 by Morningstar as the “Software of the Year” and was a CPA Wealth Provider “Financial Planning Awards Winner” in 2009. For more information, please visit www.IPSAdvisorPro.com.

About Redtail Technology

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. CRM is ultimately about not only acquiring and managing your clients and prospects – it’s also about servicing them and, in turn, extracting value from the relationships. At the same time, it’s about doing all of these things while simultaneously improving operational efficiency. Visit www.redtailtechnology.com for more information.

For More Information, please contact:

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