

# NEWS

For Immediate Release

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## **Timeline Retirement Planning Software and Redtail Technology Announce Integration**

*Integration gives advisors ability to easily import client data for efficient creation of sustainable retirement plans*

**Sacramento, CA, January 28, 2020 (PR NEWSWIRE)** – [Timelineapp Tech Limited](#) (Timeline), a fintech company that provides advisors with next-generation retirement income software, and [Redtail Technology](#) (Redtail), a leading provider of client relationship management (CRM) solutions for financial services firms, today announced an integration that will enable advisors to seamlessly import client details, account holdings, and other important data from Redtail directly into Timeline.

The integration will give Timeline users the ability to create retirement plans easily and efficiently by importing all of the client information and data already within the Redtail platform – completing 90% of the work involved in creating a retirement plan, eliminating the need for manual entry, saving advisors time and reducing human error. Once all data has been imported into Timeline, advisors can provide a viable withdrawal strategy by verifying the withdrawal success rate of a client's portfolio over time, helping to create highly personalized and sustainable retirement plans for clients.

Advisors using Timeline's withdrawal strategy software will be able to create robust retirement plans for their clients thanks to the ability to:

- Assess the sustainability of withdrawal from drawdown portfolios
- Show clients the impact of asset allocation decisions, rebalancing, fees, and taxes on the sustainability of their portfolio
- Create a Withdrawal Policy Statement in minutes
- Prepare clients for market declines up-front and how to deal with them
- Bring longevity risk to life – show clients the probability of outliving their portfolio

“We’re very excited about our integration with Redtail, which is one of the leading CRM providers for advisors,” said Abraham Okusanya, CEO of Timeline. “The integration will eliminate the need for manual entry of client data, saving advisors time and helping to create comprehensive retirement plans for clients more efficiently than ever.”

“We’re very pleased to be integrating with Timeline, which gives advisors using Redtail the ability to easily create robust and sustainable retirement plans for their clients,” said Brian McLaughlin, CEO of Redtail. “We’re constantly innovating and enhancing the capabilities of the Redtail platform thanks to our partnerships with companies like Timeline.”

Redtail users can [register here](#) for an instructional New Partner webinar taking place on February 5<sup>th</sup> at 1pm ET, where advisors will learn how to get signed up, set up, and using the integration with Timeline. Timeline CEO Abraham Okusanya shares additional comments about the integration [in this short video](#).

## **ABOUT TIMELINE**

Timelineapp Tech Limited is the next-gen retirement income software used by financial planners to illustrate, create and manage sustainable withdrawal strategy for their clients. It is used by financial professionals in the UK, US and other developed countries across the world. Timeline’s extensive empirical asset class and longevity data help financial advisors bring a client’s retirement journey to life and answer their big retirement income questions through unique personalization and engagement capabilities. Learn more at [www.timelineapp.co](http://www.timelineapp.co). Follow Timeline on Twitter @Timeline\_Tech.

## **ABOUT REDTAIL TECHNOLOGY**

Founded in 2003, Redtail Technology is a leading provider of web-based Client Relationship Management (CRM), compliant text messaging solutions (Redtail Speak), paperless office, and email archiving solutions in the financial services industry. The company is dedicated to helping advisors efficiently grow their firms by providing them with the core technologies that drive their day-to-day operations, offering low cost and easy to implement applications and integrating with many of the industry's most widely used applications. As a pioneer in the financial technology industry, Redtail is committed to providing advisors exceptional customer service and strives to contribute in meaningful ways to its local communities in California, Arizona, and Georgia. For more information, visit [www.redtailtechnology.com](http://www.redtailtechnology.com).

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