

Andes Wealth Technologies Announces Risk Analysis Integration with Redtail CRM

Andes Wealth Technologies partners with Redtail CRM to streamline risk analysis for financial advisors, enabling more personalized client experiences.

BOSTON, MA, US, April 25, 2023 /EINPresswire.com/ -- [Andes Wealth Technologies](#), the first company to combine behavioral finance with risk visualizations, announces a new integration with [Redtail Technology](#), the market-leading CRM solution for financial advisors.



Andes Wealth + Redtail CRM

With this integration, advisors can sync client and prospect data from Redtail CRM to Andes Wealth platform, including households, investors, accounts and positions, streamlining the process for investor risk tolerance assessment, portfolio analysis, proposal and Investment

Policy Statement generation, leading to more meaningful conversations between advisors and clients.

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Now, financial advisors can achieve increased scalability and operational efficiency while enabling more meaningful conversations about risk, investing and emotions with their clients.”

Helen Yang, CEO of Andes Wealth Technologies

“More than ever, advisors are called upon to provide truly personalized experiences to clients,” said David Mehlhorn, Vice President of Business Development at Redtail.

“Redtail’s integration with Andes Wealth Technologies will empower advisors to meet those expectations by streamlining workflows to drive efficiency and a better end client experience.”

Andes’ defensible Risk Tolerance Test, which has received

numerous industry accolades and [was recently awarded a patent](#), maps an investor’s risk preference directly to one of the advisor’s model portfolios. Its comprehensive risk framework also enables advisors to deliver timely insights that reinforce conversations around emotions and biases, realign risk perceptions and create more successful outcomes.

"We're thrilled to announce our integration with Redtail and deepen our partnership with Orion [who acquired Redtail in June 2022]," said Helen Yang, CFA, founder and CEO of Andes Wealth Technologies. "Through this integration, financial advisors will achieve increased scalability and operational efficiency while enabling more meaningful conversations about risk, investing and emotions with their clients."

On the upcoming roadmap is a real-time API integration that will send investor risk and behavioral data in the Andes platform to Redtail.

Advisors already using Redtail interested in taking advantage of this powerful partnership should reach out to support@andeswealth.com for setup assistance.

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About Andes Wealth Technologies

Andes Wealth Technologies is the first company to combine behavioral finance with deep analytics to help financial advisors differentiate and deliver truly personalized advice. Inspired by Dr. Andrew Lo from MIT and his Adaptive Markets Theory, Andes Wealth Platform has received two patents and numerous awards, including the WealthManagement.com Industry Award, WealthTech Americas Award, Family Wealth Report Award, and ThinkAdvisor Luminaries Award.

To learn more, visit <https://andeswealth.com>.

About Redtail Technology

Founded in 2003 and acquired by Orion Advisor Solutions in 2022, Redtail Technology is a leading provider of web-based Client Relationship Management (CRM), compliant text messaging solutions (Redtail Speak), advisor marketing technology (Redtail Campaigns), paperless office, and email archiving solutions in the financial services industry. Redtail 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 brand entity of Orion and a pioneer in the financial technology industry, Redtail is committed to providing advisors with 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.

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