
Morningstar and Redtail expand partnership

By Editorial Staff Thu, Apr 21, 2016

The integration expands the relationship between the two firms. In 2014, Morningstar's proprietary research and analytics were added to the Redtail CRM user interface.

Morningstar Office, the portfolio and practice management system for financial advisors, is adding Redtail Technology's customer relationship management capabilities, Morningstar Inc. reported this week.

With the integration, advisors will be able to transfer data between firms to reduce redundant entry and provide up-to-date client and account data within the Redtail CRM interface. Morningstar Office also offers account aggregation, back-office services, and rebalancing capabilities.

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Morningstar Office includes portfolio management and performance reporting, advanced research functionality, investment planning, and secure client communication. Redtail CRM solutions include automated workflows, an "intuitive user interface," and paperless office and email archiving.

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