Integration with Redtail

Wealth management firms, advisors and client service teams who use Redtail can now enjoy an integration with Max, the industry-leading cash management solution, to streamline account setup for your clients.

Integration Benefits

Clients appreciate Max's industry-leading cash management solution, whether they use it for a set amount of cash (such as an emergency fund) or to earn more on the cash sitting in their portfolios. In today's interest rate environment, every basis point counts.

While advisors and support teams can set up clients using the "Invite Clients" tool on the Max Advisor Dashboard, Redtail now offers an even faster and easier way to to set up new clients and prospects.

Any Redtail user looking at a client account record can simply and securely send client information to Max to kick off the setup process for a customer. Information ports seamlessly from Redtail to Max, pre-filling the Max application form for clients.

How It Works

1. First, *enable the integration* by looking up "Max For Advisors" in the list of integrations available within Redtail.

2. Redtail uses single sign on (SSO) to create a secure connection with Max. You'll be prompted to enter your Max Advisor Dashboard credentials once to create this secure connection. *Don't have a Max Advisor Dashboard account? You can register for free in a minute or two at MaxForAdvisors.com.*

3. When looking at a client record, select the drop-down menu of actions and then click "Send Invitation"

Clients will instantly receive an email invitation. From there, the client will proceed with setting up their Max account. Advisors and client service teams can monitor the client's progress and account balances from the Max Advisor Dashboard or other data reporting integrations.

Questions? Need Help?

If you you need support enabling the integration, contact Redtail support. If you have questions about Max, contact advisors@maxmyinterest.com or visit MaxMyInterest.com/Contact-Us for client-specific issues, assistance, or onboarding support.

Note: Currently the Redtail integration supports individual and joint accounts only. Refer to the Max Advisor Dashboard to learn how to set up revocable trusts, complex trusts, LLCs, foundations, and business and non-profit accounts.