

Redtail Integration Announcement

Altigo Integrates with Redtail CRM to Further Streamline Alternative Investment Processing

WealthForge announced today that Altigo, their electronic processing platform for alternative investments, now integrates with Redtail, a customer relationship management solution widely used in the financial services industry. The API integration will allow reps and advisors to pre-populate fields in Altigo's digital order entry process with investor information stored in Redtail, reducing subscription time to as little as 5 minutes.

"Our goal with Altigo is to make the investment process as seamless as possible. In order to do that we are taking every opportunity we can to remove manual data entry, which is time-consuming and can be prone to errors," says Bill Robbins, CEO of WealthForge. "By integrating with CRM platforms like Redtail, we're enabling financial representatives to make alternative investment transactions with unprecedented ease, freeing up more time for them to spend with their clients."

When users of Redtail initiate a subscription through Altigo, they will be presented with the option to select a client from their CRM in addition to the usual options of drafting a subscription from scratch or copying information from a previously completed investment. The integration further enhances Altigo's revolutionary process improvements. The platform reduces NIGO (not-in-good-order) error rates from 30-60 percent down to less than 5 percent and boasts investment cycle-times of 2 days, compared to approximately 3 weeks on average using paper processes.

For more information about Altigo, [visit our product page](#) or [contact us](#) with any questions.

About WealthForge

WealthForge provides technology solutions developed by experienced regulatory professionals to streamline investments into alternative securities. The company's electronic investment processing platform, Altigo was built to address common industry roadblocks, enable marketplace connections, and facilitate alternative investment transactions **between reps, advisors, product sponsors, custodians and transfer agents**. With over a decade of experience processing alternative investments and developing technology solutions, WealthForge has built a reputation as an innovator in the market.

