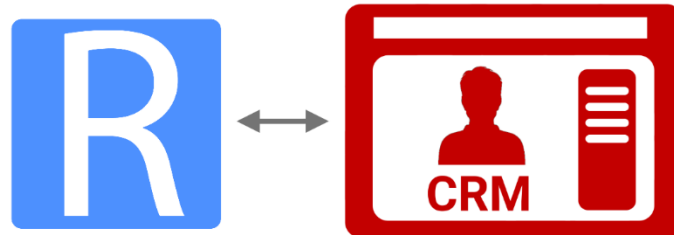
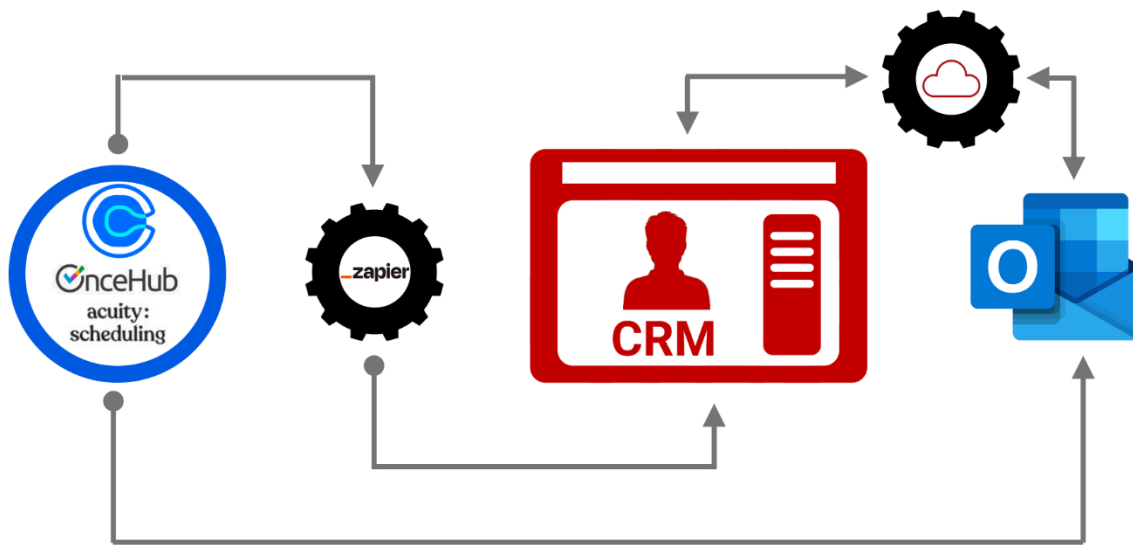




Spend Time Growing Your Business



NOT Building an Integration



You're in the Financial Services industry, not technology. You want software that works "out of the box", not a complicated and fragile system you have to piece together and maintain yourself.

GReminders integrates DIRECTLY with the tools Financial Advisors use most...



GReminders

Scheduling BUILT for Financial Advisors

Compare GReminders with Calendly, OnceHub & Acuity Scheduling

FEATURES & CAPABILITIES	Calendly	OnceHub	acuity: scheduling	 GReminders
SCHEDULING				
Allow Clients to Self Schedule Appointments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Embed Scheduling into your Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
All together & Round-Robin Team Scheduling	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Group Scheduling	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Approve or Decline Appointments prior to final Booking	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Event Routing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	—	<input checked="" type="checkbox"/>
Recurring Appointments	—	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Include Post Scheduling Questions	—	—	—	<input checked="" type="checkbox"/>
REMINDERS				
Send Email Reminders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Send SMS Reminders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Send Voice Reminders	—	—	—	<input checked="" type="checkbox"/>
Automated Reschedule Notifications	—	—	—	<input checked="" type="checkbox"/>
Limitless Reminders Before & After Appointments	—	—	—	<input checked="" type="checkbox"/>
Auto-Replies Based on Client Responses	—	—	—	<input checked="" type="checkbox"/>
Reminders with Conditional Logic & Liquid Template Coding	—	—	—	<input checked="" type="checkbox"/>
Built-in URL Shortener	—	—	—	<input checked="" type="checkbox"/>
Dedicated Phone Number for SMS Reminders	—	—	—	<input checked="" type="checkbox"/>
Reminders Sent when you schedule directly on your Calendar	—	—	—	<input checked="" type="checkbox"/>
CRM INTEGRATIONS				
Integrate Directly with Redtail CRM	—	—	—	<input checked="" type="checkbox"/>
Integrate Directly with Redtail Calendar	—	—	—	<input checked="" type="checkbox"/>
Integrate Directly with Wealthbox CRM	—	—	—	<input checked="" type="checkbox"/>
Create New Contacts in Redtail/Wealthbox	—	—	—	<input checked="" type="checkbox"/>
Create Contacts to Specified Status in Redtail	—	—	—	<input checked="" type="checkbox"/>
Send Reminders in Contact Time Zone based on Zip Code	—	—	—	<input checked="" type="checkbox"/>
Schedule Events to Specified Activity Types in Redtail	—	—	—	<input checked="" type="checkbox"/>
Schedule events to specified Categories in Redtail/Wealthbox	—	—	—	<input checked="" type="checkbox"/>
Map Custom Questions to Custom Fields in Redtail/Wealthbox	—	—	—	<input checked="" type="checkbox"/>
Route to Servicing Advisor in Redtail	—	—	—	<input checked="" type="checkbox"/>
Route to Custom Roles in Wealthbox	—	—	—	<input checked="" type="checkbox"/>
Allow Availability for Specific Activity Types in Redtail	—	—	—	<input checked="" type="checkbox"/>
Reminders Personalized using Nicknames in Redtail/Wealthbox	—	—	—	<input checked="" type="checkbox"/>
Automatically Launch Workflows in Redtail/Wealthbox	—	—	—	<input checked="" type="checkbox"/>
Automate Annual Review & Webinar Invites with Bulk Sends	—	—	—	<input checked="" type="checkbox"/>

GReminders.com/wealthcare