Redtail vs. Salesforce: The Honest Comparison

A side by side look for RIA principals and COOs deciding whether, and when, to move.

At a Glance

	Redtail	Salesforce Financial Services Cloud
Best fit	Solo advisors, small teams (under ~50 advisors)	Growing and multi-office firms, complex household/entity structur
Data model	Flat contact model	Relational model: households, entities, financial accounts, relatio
Compliance & audit trail	Basic activity logs	Structured, audit-ready records with authorship and timestamps
Integrations	Strong within its ecosystem	Broad custodian, planning, and AI tool ecosystem, enterprise-gra
Reporting	Per-user, limited cross-office view	Enterprise reporting across pipeline, productivity, AUM
Setup cost & speed	Lower cost, fast setup	Higher upfront investment, built for scale
AI readiness	Disconnected point tools	Governed data foundation for agentic AI

Redtail Is Not a Bad Product

To be fair, Redtail still wins on simplicity, lower per-user cost, and fast setup for very small teams. It is not a bad product. It is a product with a ceiling. The pressure to move usually builds as a firm scales: more advisors and offices, households and entities that will not fit a flat contact model, compliance requirements that basic activity logs cannot satisfy, and AI initiatives that need governed data rather than disconnected point tools.

Signs You Have Outgrown Redtail

- You are managing 50 to 150+ advisors, or expect to be soon.
- Households, trusts, and multi-advisor relationships do not fit cleanly into flat contacts.
- Compliance officers need structured, audit-ready notes, not free-text activity logs.
- Leadership wants cross-office reporting on pipeline, productivity, and AUM without manual spreadsheet exports.
- You are evaluating AI tools that require a governed, relationship-aware data model to work well.

Alternatives Worth Ruling Out First

Before committing to any migration, it is worth confirming Redtail is actually the constraint, not a configuration or workflow issue. Common alternatives firms evaluate alongside Salesforce include other wealth-specific CRMs and point solutions bolted onto Redtail. Most of these solve a single symptom (reporting, or compliance, or AI note-taking) without addressing the underlying flat data model, which is why firms that outgrow Redtail tend to land on a relationship-aware platform like Salesforce Financial Services Cloud rather than a lateral move to another entry-level CRM.

Not sure which side of the line your firm is on?

Get a Migration Readiness Assessment at navirum.com, a five minute check on your data, integrations, and team, with a personalized read on whether now is the right time to move.