

PRECISEFP / REDTAIL MAPPING TABLE

Important Information
 When searching for Redtail Contacts, make sure that your contact is the Head of the Family and has a valid email address set as "Preferred". To set an email as "Preferred", edit the email address and check the "Is Preferred" checkbox.

Redtail Section	PreciseFP Section		Comments
Contacts	Client Details		<i>Integrates records with Family Relationship of "Head" as clients and "Spouse" as co-clients</i>
Redtail Field	PreciseFP Field	Required	Comments
First Name	Client Details/Personal Details/First Name	Yes	
Middle Name	Client Details/Personal Details/Middle Initial		
Last Name	Client Details/Personal Details/Last Name	Yes	
Date of Birth	Client Details/Personal Details/Birthdate		
Gender	Client Details/Personal Details/Gender		
Marital Status	Client Details/Personal Details/Marital Status		
Mobile Phone	Client Details/Contact Details/Mobile Phone		
Home Phone	Client Details/Contact Details/Home Phone		
Work Phone	Client Details/Contact Details/WorkPhone		
Email Address (Preferred)	Client Details/Contact Details/Email	Yes	
Driver's License Number	Client Details/Driver's License/Number		
Driver's License Issue Date	Client Details/Driver's License/Issue Date		
Driver's License Expiration Date	Client Details/Driver's License/Expire Date		<i>Driver's licenses from non-U.S. countries will not integrate.</i>
Driver's License State	Client Details/Driver's License/Jurisdiction		
Address 1	Client Details/Contact Details/Address		
City	Client Details/Contact Details/Address		
Zip	Client Details/Contact Details/Address		<i>Addresses from non-U.S. countries will not integrate.</i>
State	Client Details/Contact Details/Address		
Employer	Employment & Income/Employment/Employer		<i>Employer only allows import.</i>
Job Title	Employment & Income/Employment/Job Position		
Important information	Client Details/Other Information/Comments		

Redtail Section	PreciseFP Section		Comments
Contacts	Children		<i>Integrates records where Family Relationship is "Child"</i>
Redtail Field	PreciseFP Field	Required	Comments
Family Relationship	<i>Child</i>	Yes	
First Name	Family Members/Children/First Name	Yes	
Middle Name	Family Members/Children/Middle Initial		
Last Name	Family Members/Children/Last Name	Yes	
Date of Birth	Family Members/Children/Birthdate		
Gender	Family Members/Children/Gender		
Email (Preferred)	Family Members/Children/Email		
Phone (Home)	Family Members/Children/Phone		
Address 1	Family Members/Children/Address		
Address 2	Family Members/Children/Address		
City	Family Members/Children/Address		<i>Addresses from non-U.S. countries will not integrate.</i>
Zip	Family Members/Children/Address		
State	Family Members/Children/Address		

Redtail Section	PreciseFP Section		Comments
Contacts	Other Family Members		<i>Integrates records where Family Relationship is different than "Child"</i>
Redtail Field	PreciseFP Field	Required	Comments
Family Relationship	<i>See comments</i>	Yes	PreciseFP Relationship Type Redtail Relationship Type
First Name	Family Members/Other Family Members/First Name	Yes	<i>Other (Default)</i> <i>Other</i>
Middle Name	Family Members/Other Family Members/Middle Initial		<i>Grandchild</i> <i>Grandchild</i>
Last Name	Family Members/Other Family Members/Last Name	Yes	
Date of Birth	Family Members/Other Family Members/Birthdate		
Gender	Family Members/Other Family Members/Gender		
Email (Preferred)	Family Members/Other Family Members/Email		
Phone (Home)	Family Members/Other Family Members/Phone		
Address 1	Family Members/Other Family Members/Address		
Address 2	Family Members/Other Family Members/Address		
City	Family Members/Other Family Members/Address		<i>Addresses from non-U.S. countries will not integrate.</i>
Zip	Family Members/Other Family Members/Address		
State	Family Members/Other Family Members/Address		

Redtail Section	PreciseFP Section	Comments
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Accounts	Insurance		Integrates records where Type is "Variable Universal Life", "Term Life", "Universal Life", "Whole Life", or "Variable Life" and Tax Qualified is "false"	
Redtail Field	PreciseFP Field	Required	Comments	
Type	See comments	Yes	PreciseFP Insurance Type	Redtail Insurance Type
Owner	Insurance/Life Insurance/Insured	Yes	Term Life	Term Life
Account Number	Insurance/Life Insurance/Name	Yes	Whole Life	Whole Life
Company	Insurance/Life Insurance/Provider		Universal Life	Universal Life
Cash Value	Insurance/Life Insurance/Cash Value		Variable Life	Variable Life
Premium Amount	Insurance/Life Insurance/Premium		Variable Universal Life	Variable Universal Life
Face Value	Insurance/Life Insurance/Coverage Amount			
Tax Qualified	false	Yes		

Redtail Section	PreciseFP Section	Comments		
Accounts	Health Insurance		Integrates records where Type is "Individual Medical" and Tax Qualified is "false"	
Redtail Field	PreciseFP Field	Required	Comments	
Type	Individual Medical	Yes		
Owner	Insurance/Health Insurance/Insured	Yes		
Account Number	Insurance/Health Insurance/Name	Yes		
Company	Insurance/Health Insurance/Provider			
Premium Amount	Insurance/Health Insurance/Premium			
Tax Qualified	false	Yes		

Redtail Section	PreciseFP Section	Comments		
Accounts	Disability Insurance		Integrates records where Type is "Long Term Disability" and Tax Qualified is "false"	
Redtail Field	PreciseFP Field	Required	Comments	
Type	Long Term Disability	Yes		
Owner	Insurance/Disability Insurance/Insured	Yes		
Account Number	Insurance/Disability Insurance/Name	Yes		
Company	Insurance/Disability Insurance/Provider			
Premium Amount	Insurance/Disability Insurance/Premium			
Tax Qualified	false	Yes		
Face Value	Insurance/Disability Insurance Coverage Amount			

Redtail Section	PreciseFP Section	Comments		
Accounts	Long Term Care		Integrates records where Type is "Long Term Care" and Tax Qualified is "false"	
Redtail Field	PreciseFP Field	Required	Comments	
Type	Long Term Care	Yes		
Owner	Insurance/Long Term Care Insurance/Insured	Yes		
Account Number	Insurance/Long Term Care Insurance/Name	Yes		
Company	Insurance/Long Term Care Insurance/Provider			
Premium Amount	Insurance/Long Term Care Insurance/Premium			
Tax Qualified	false	Yes		

Redtail Section	PreciseFP Section	Comments		
Accounts	401(k)		Integrates records where Type and Tax Qualified Type are "401(k)" and Tax Qualified is "true"	
Redtail Field	PreciseFP Field	Required	Comments	
Type	401(k)	Yes	Account Balance will export as an Account Asset with Name equal to the Account Number, Shares = 1 and Price equal to the account balance.	
Tax Qualified Type	401(k)	Yes	If this asset does not exist in the account, it will be created. If you are getting account assets from an external system, we recommend removing the "balance" from the mapper.	
Owner	Retirement Plans/401(k)/Owner	Yes		
Number	Retirement Plans/401(k)/Name	Yes		
Balance	Retirement Plans/401(k)/Account Value			
Tax Qualified	true	Yes		

Redtail Section	PreciseFP Section	Comments		
Accounts	Roth 401(k)		Integrates records where Type is "Other", Tax Qualified Type is "401(k)" and Tax Qualified is "true"	
Redtail Field	PreciseFP Field	Required	Comments	
Type	Other	Yes		
Tax Qualified Type	401(k)	Yes		
Owner	Retirement Plans/Roth 401(k)/Owner	Yes		
Number	Retirement Plans/Roth 401(k)/Name	Yes		
Balance	Retirement Plans/Roth 401(k)/Account Value			
Tax Qualified	true	Yes		

Redtail Section	PreciseFP Section	Comments		
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Accounts	403(b)		<i>Integrates records where Type is "TSA", Tax Qualified Type is "403(b)" and Tax Qualified is "true"</i>
Redtail Field	PreciseFP Field	Required	Comments
Type	TSA	Yes	
Tax Qualified Type	403(b)	Yes	
Owner	Retirement Plans/403(b)/Owner	Yes	
Number	Retirement Plans/403(b)/Name	Yes	
Balance	Retirement Plans/403(b)/Account Value		
Tax Qualified	true	Yes	

Redtail Section	PreciseFP Section		Comments
Accounts	457(b)		<i>Integrates records where Type is "TSA", Tax Qualified Type is "457(b) Plan" and Tax Qualified is "true"</i>
Redtail Field	PreciseFP Field	Required	Comments
Type	TSA	Yes	
Tax Qualified Type	457(b) Plan	Yes	
Owner	Retirement Plans/457(b)/Owner	Yes	
Number	Retirement Plans/457(b)/Name	Yes	
Balance	Retirement Plans/457(b)/Account Value		
Tax Qualified	true	Yes	

Redtail Section	PreciseFP Section		Comments
Accounts	IRA		<i>Integrates records where Type is "Brokerage Account", Tax Qualified Type is "Traditional IRA" and Tax Qualified is "true"</i>
Redtail Field	PreciseFP Field	Required	Comments
Type	Brokerage Account	Yes	
Tax Qualified Type	Traditional IRA	Yes	
Owner	Retirement Plans/IRA/Owner	Yes	
Number	Retirement Plans/IRA/Name	Yes	
Balance	Retirement Plans/IRA/Account Value		
Tax Qualified	true	Yes	

Redtail Section	PreciseFP Section		Comments
Accounts	Roth IRA		<i>Integrates records where Type is "Brokerage Account", Tax Qualified Type is "Roth IRA" and Tax Qualified is "true"</i>
Redtail Field	PreciseFP Field	Required	Comments
Type	Brokerage Account	Yes	
Tax Qualified Type	Roth IRA	Yes	
Owner	Retirement Plans/Roth IRA/Owner	Yes	
Number	Retirement Plans/Roth IRA/Name	Yes	
Balance	Retirement Plans/Roth IRA/Account Value		
Tax Qualified	true	Yes	

Redtail Section	PreciseFP Section		Comments
Accounts	Simple IRA		<i>Integrates records where Type is "Brokerage Account", Tax Qualified Type is "Simple IRA" and Tax Qualified is "true"</i>
Redtail Field	PreciseFP Field	Required	Comments
Type	Brokerage Account	Yes	
Tax Qualified Type	Simple IRA	Yes	
Owner	Retirement Plans/Simple IRA/Owner	Yes	
Number	Retirement Plans/Simple IRA/Name	Yes	
Balance	Retirement Plans/Simple IRA/Account Value		
Tax Qualified	true	Yes	

Redtail Section	PreciseFP Section		Comments
Accounts	SEP IRA		<i>Integrates records where Type is "Brokerage Account", Tax Qualified Type is "SEP IRA" and Tax Qualified is "true"</i>
Redtail Field	PreciseFP Field	Required	Comments
Type	Brokerage Account	Yes	
Tax Qualified Type	SEP IRA	Yes	
Owner	Retirement Plans/Simple IRA/Owner	Yes	
Number	Retirement Plans/Simple IRA/Name	Yes	
Balance	Retirement Plans/Simple IRA/Account Value		
Tax Qualified	true	Yes	

Redtail Section	PreciseFP Section		Comments
Accounts	Pensions		<i>Integrates records where Type is "Brokerage Account", Tax Qualified Type is "Pension Plan" and Tax Qualified is "true"</i>
Redtail Field	PreciseFP Field	Required	Comments
Type	Brokerage Account	Yes	
Tax Qualified Type	Pension Plan	Yes	

Owner	Retirement Plans/Pensions/Owner	Yes
Number	Retirement Plans/Pensions/Name	Yes
Balance	Retirement Plans/Pensions/Distribution Amount	
Tax Qualified	true	Yes

Redtail Section	PreciseFP Section		Comments
Accounts	Annuities		Integrates records where Type is "Annuity", Tax Qualified Type is "Variable Annuity", "Indexed Annuity", or "Fixed Annuity" and Tax Qualified is "true"
Redtail Field	PreciseFP Field	Required	Comments
Type	See comments	Yes	PreciseFP Annuity Type Redtail Annuity Type
Tax Qualified Type	Annuity	Yes	Variable Variable Annuity
Owner	Assets/Annuities/Owner	Yes	Indexed Indexed Annuity
Number	Assets/Annuities/Name	Yes	Fixed Fixed Annuity
Balance	Assets/Annuities/Account Value		
Tax Qualified	true	Yes	

Redtail Section	PreciseFP Section		Comments
Accounts	Taxable Investment Account		Integrates records where Type is "Brokerage Account" and Tax Qualified is "false"
Redtail Field	PreciseFP Field	Required	Comments
Type	Brokerage Account	Yes	
Owner	Assets/Annuities/Owner	Yes	
Number	Assets/Annuities/Name	Yes	
Balance	Assets/Annuities/Account Value		
Tax Qualified	false	Yes	

Redtail Section	PreciseFP Section		Comments
Assets	Bank Accounts		Imports records where Type is "Checking Account", "Savings Account", or "Money Market"
Redtail Field	PreciseFP Field	Required	Comments
Type	See comments	Yes	PreciseFP Asset Type Redtail Asset Type
Owner	Assets/Bank Accounts/Owner	Yes	Checking Checking Account
Name	Assets/Bank Accounts/Name	Yes	Savings Savings Account
Balance	Assets/Bank Accounts/Average Balance		Money Market Money Market

Redtail Section	PreciseFP Section		Comments
Assets	CDs		Imports records where Type is "CD"
Redtail Field	PreciseFP Field	Required	Comments
Owner	Assets/Certificates of Deposit/Owner	Yes	
Name	Assets/Certificates of Deposit/Name	Yes	
Balance	Assets/Certificates of Deposit/Current Value		

Redtail Section	PreciseFP Section		Comments
Assets	Personal Property		Imports records where Type is "Real Estate", "Automobile" or "Collectibles"
Redtail Field	PreciseFP Field	Required	Comments
Owner	Assets/Personal Property/Owner	Yes	PreciseFP Property Type Redtail Property Type
Name	Assets/Personal Property/Name	Yes	Primary Residence Real Estate
Balance	Assets/Personal Property/Current Value		Vehicle Automobile
Type	See comments		Collectibles Collectibles

Redtail Section	PreciseFP Section		Comments
Assets	Other Assets		Imports records where Type is "Other"
Redtail Field	PreciseFP Field	Required	Comments
Owner	Assets/Other Assets/Owner	Yes	
Name	Assets/Other Assets/Name	Yes	
Balance	Assets/Other Assets/Current Value		

Redtail Section	PreciseFP Section		Comments
Liabilities	Credit Cards		Imports records where Type is "Credit Card Debt"
Redtail Field	PreciseFP Field	Required	Comments
Type	Credit Card Debt	Yes	
Owner	Liabilities/Credit Cards/Owner	Yes	
Name	Liabilities/Credit Cards/Name	Yes	
Balance	Liabilities/Credit Cards/Current Balance		

Redtail Section	PreciseFP Section		Comments
Liabilities	Mortgages		Imports records where Type is "Mortgage"
Redtail Field	PreciseFP Field	Required	Comments

Type	Mortgage	Yes	
Owner	Liabilities/Mortgages/Owner	Yes	
Name	Liabilities/Mortgages/Name	Yes	
Balance	Liabilities/Mortgages/Current Balance		

Redtail Section	PreciseFP Section		Comments	
Liabilities	Loans		<i>Imports records where Type is "Auto Loan", "Other", or "Personal Loan"</i>	
Redtail Field	PreciseFP Field	Required	Comments	
Type	<i>See comments</i>	Yes	PreciseFP Property Type	Redtail Property Type
Owner	Liabilities/Loans/Owner	Yes	<i>Auto</i>	<i>Auto Loan</i>
Name	Liabilities/Loans/Name	Yes	<i>Personal Note</i>	<i>Personal Loan</i>
Balance	Liabilities/Loans/Current Balance		<i>Other</i>	<i>Other</i>