

Jump.

SEI Strategic Partner



Leverage our relationships to get discounted pricing on valuable services.

As part of our continued commitment to help advisors power wealth and focus on client relationships, we have established strategic partnerships with several key business service partners to help you **reduce costs**, **save time** and **increase efficiencies** to run a more successful firm.

Jump

Jump's Advisor AI Meeting Assistant is designed specifically for financial advisors, transforming how wealth teams handle meeting-related tasks by cutting administrative time. The average Jump user saves at least 1 hour per work day, with some Jump users cutting meeting-related admin time by 75% or more¹. With Jump, advisors can automate meeting prep, note-taking for compliance and better client service, CRM updates, client recap emails, financial data extraction, and follow-up tasks, drastically reducing the time spent on post-meeting work. Deeply integrated with the advisor tech stack, including Redtail, Wealthbox, Salesforce, and more, Jump is fully customizable to fit any advisor's unique style while maintaining industry-friendly safety and compliance standards, including SOC-2 Type II certification, HIPAA-friendly data handling, never training AI models with PII, and giving you control over data retention. Since its launch in 2023, Jump has earned accolades such as Best in Show at WealthManagement EDGE and has become the trusted partner of thousands of advisors.

Contact
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Discount
10%

Website
<https://jumpapp.com/sei>

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¹ Source: Survey of 100 Jump customers, December 2024