zocks | The #1 AI Assistant for financial advisors

Zocks or Jump: Which does more for your firm?

Zocks takes **more accurate notes**, lets you **change anything yourself**, and **goes above and beyond** to take care of you.

#1 rated on G2 4.8 ★★★★★

Already using Jump? We'll move you over.
We rebuild your templates, setup, and past conversation data.

Six reasons advisors switch from Jump to Zocks

1 **Accuracy.** Get notes you do not have to spend time fixing.

Zocks knows who said what, even with a couple in the room. No speakers to tag by hand or fix notes after every call. Zocks pushes the most accurate data into every client record and your next prep.

2 **Configurability.** Change anything yourself, in minutes.

Your notes, summaries, follow-up emails, and forms run on templates you control. Paste in an email you already send and Zocks builds a template from it. You can update and change templates any time yourself.

3 **Service.** People who do more for you.

Zocks goes above and beyond to help you put AI into practice. We rebuild your templates and setup. You get one-on-one onboarding with a real product expert, plus two free live AI training sessions.

4 **Privacy.** Conversations are never recorded.

Zocks never records client conversations. Period. Clients don't like sensitive conversations being recorded, and it adds compliance burden. Zocks captures the same details with no recording to disclose or retain.

5 **Integrations.** 40+ deep two-way integrations.

Zocks updates — and pulls data back from — your CRM, financial planning, tax, and portfolio management to automate workflows like client onboarding, account openings, meeting preparation, financial plans, and more.

6 **Book-wide Intelligence.** Find growth opportunities across your book.

Ask Zocks which of your clients have held-away assets, upcoming RMDs, or unmet planning needs. Zocks searches every conversation, email, document, and connected system then returns a matching list of clients.

COMPARISON

	zocks	Jump
CORE AI CAPABILITIES	** Availability of functionality subject to LPL approval.**	
Meeting Prep & Notetaking	YES	YES
Meeting Live Agenda Tracking	YES	NO
Auto Form Filling (Intake, Application, Workflows)	YES	Intake forms only
Email Replies	YES	YES
Document Intelligence	YES	YES
Scheduling	YES	YES
Advisor Reporting & Analytics	YES	Separate product
Conversation Insights	YES	Pre-defined signals only
Ask Anything (single client)	YES	YES
Client Queries (search your entire book)	YES	NO
Coaching Center	YES	YES
Client Profiles	YES	YES
Mobile App	YES	Take and view notes only
INTEGRATIONS		
CRM Integration	YES 13+	Notes,tasks,basic field sync
Financial Planning Integration	YES	Prep context & suggested updates
Tax Planning Integration	YES	Read-only prep context
Estate Planning Integration	YES	YES
Portfolio Management & Reporting Integration	YES	Read-only prep context
Automation Integration	YES	Task workflows only
Archive Integration	YES	NO
Open APIs	YES	NO
MCP Connector for Claude & ChatGPT	YES	NO
Data Warehouse Integration	YES	NO
ENTERPRISE & SECURITY		
No Recordings	YES	NO
Data Security & Privacy Controls	YES	Recording stored & retained
Enterprise Reporting & Analytics	YES	Separate product
Native MCP Connector for Claude, ChatGPT, and Microsoft Copilot	YES	NO, via Zapier (Claude only)
User Roles & Permissions	YES	Team & account roles
Security, Compliance & Supervision Controls	YES	YES
HIPAA Compliant and SOC 2 Type 2 Certified	YES	YES
Professional Services	YES	Unknown
Zero Data Retention Controls with Model Providers	YES	YES

> "Out of the box, before I did anything, when I opened up Zocks and just looked at what a meeting summary looks like — I was blown away. Out of the box, it was way better than Jump."

Marc Willden
Advisor, Wealth Partners Financial



> "Jump is prepackaged. You don't get a lot of support after you buy. Zocks had all of it, more robust and quicker responses."

Cody Makela
Arlington Financial Advisors



> "We chose Zocks over Jump because Zocks doesn't record, automates more things (like forms) and is easier to use. It's also very accurate and provides better, more actionable insights."

Kelly Winzig
Executive Assistant to President, W.H. Black & Company



To learn more and start a free trial, scan the QR code.

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