

# From Conversation to Conversion: The New AI Advantage for Wholesalers

LIMRA | May 13, 2026



# Preston Hunter | General Manager, Jump Grow

---



- Career in product/technology and building new 0-1 products
- Joined Jump in April 2025
  - Now leading Grow at Jump, bringing conversational intelligence to enterprise distribution teams
- Born and raised in Utah - sports nerd, outdoors, sailing, good food



# About Jump

## Adoption

**Founded 2022**  
Launched Jan 2024

**32k+** financial professionals

**2k+** new users/month

**2M+** client meetings processed

Team of **200+** with **97%** support satisfaction

## Recognition

**#1 Market Share**  
Kitces, T3

**#1 Satisfaction**  
Kitces, T3

**Category Leader**  
Kitces, Oasis Group, Ezra Group

**Fintech 100**  
CB Insights

**7x Award Winning Tech**  
Wealthies, ThinkAdvisor, Datos

## Funding

**\$105M Raised**

**INSIGHT**  
PARTNERS

**F-PRIME**

**Battery**

**citi** VENTURES

**TIAA**

**Allianz**

## Customers

**Allianz**

**Prudential**

**LPL Financial**

**Cetera**

**osaic**

# Who We Work With?

- RIAs
- IBDs
- Wirehouses
- Insurance Firms
- Wholesalers
- Retirement Firms
- Asset Managers
- Tax Professionals
- Aggregators



# Agenda

---

1

AI Trends and Adoption

---

2

Live Demo

---

3

Real World Use Cases & Stories

---

4

Q&A

# Hype or Real?

---



## 2017 - Attention Is All You Need

---

### Attention Is All You Need

---

**Ashish Vaswani\***

Google Brain

avaswani@google.com

**Noam Shazeer\***

Google Brain

noam@google.com

**Niki Parmar\***

Google Research

nikip@google.com

**Jakob Uszkoreit\***

Google Research

usz@google.com

**Llion Jones\***

Google Research

llion@google.com

**Aidan N. Gomez\* †**

University of Toronto

aidan@cs.toronto.edu

**Łukasz Kaiser\***

Google Brain

lukaszkaizer@google.com

**Illia Polosukhin\* †**

illia.polosukhin@gmail.com

# GPT / LLMs

## Generative

- Generate outputs based on inputs

## Pre-Trained

- (On massive amounts of text)
- Large Language Model



## Transformer

- 2017 breakthrough
- Consider all words at once
- Understands which are important and which relate to each other

Provided proper attribution is provided, Google hereby grants permission to reproduce the tables and figures in this paper solely for use in journalistic or scholarly works.

### Attention Is All You Need

<b>Ashish Vaswani*</b> Google Brain avaswani@google.com	<b>Noam Shazeer*</b> Google Brain noam@google.com	<b>Niki Parmar*</b> Google Research nikip@google.com	<b>Jakob Uszkoreit*</b> Google Research usz@google.com
---	---	--	--

<b>Llion Jones*</b> Google Research llion@google.com	<b>Aidan N. Gomez* †</b> University of Toronto aidan@cs.toronto.edu	<b>Lukasz Kaiser*</b> Google Brain lukaszkaizer@google.com
--	---	--

**Illia Polosukhin\* †**  
illia.polosukhin@gmail.com

Is it being used?

Is it providing ROI?

# AI Adoption Metrics

---

## Organizations

**88%**

Organizations regularly use AI in at least one business function

(78% last year)

## Carriers

**87%**

of life insurance carriers are already using AI in one or more operational areas.

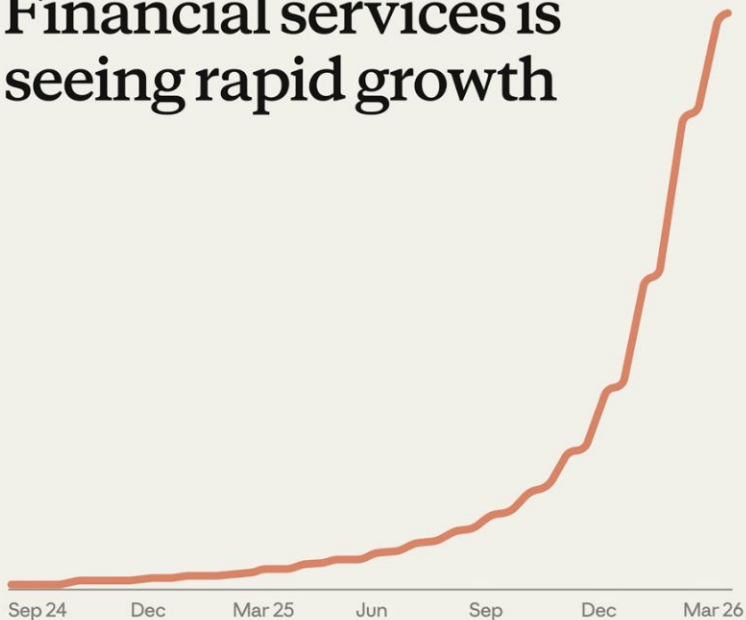
## Life insurers

**100%**

of surveyed life insurers are using LLMs in production or actively testing for deployment.

# AI Adoption Metrics - Anthropic Revenue

**Financial services is seeing rapid growth**



**#2**

industry by enterprise revenue, after tech (every month for 20 months)

**40%**

of our top 50 customers are financial institutions

**Jul '25**

first industry vertical solution launched

The question is no longer value or capability. It's **change management, distribution and application.**

# There is a reason Anthropic and OpenAI announced consulting businesses to implement AI

AI • ANTHROPIC

## Anthropic takes shot at consulting industry in joint venture with Wall Street giants

By  Nick Lichtenberg  
Business Editor

[Add us on](#)   

May 4, 2026, 10:37 AM ET



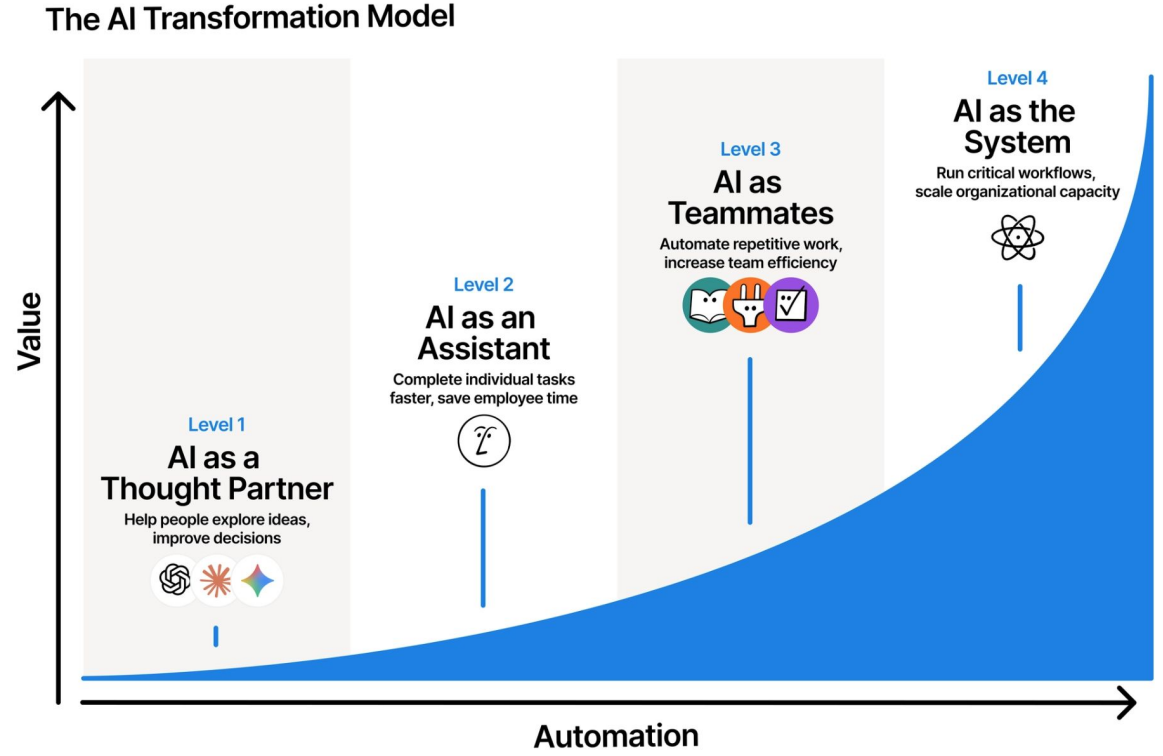
May 11, 2026 Company

# OpenAI launches the OpenAI Deployment Company to help businesses build around intelligence

OpenAI has agreed to acquire Tomoro, giving the OpenAI Deployment Company experienced Forward Deployed Engineers from day one.

[Learn more](#)

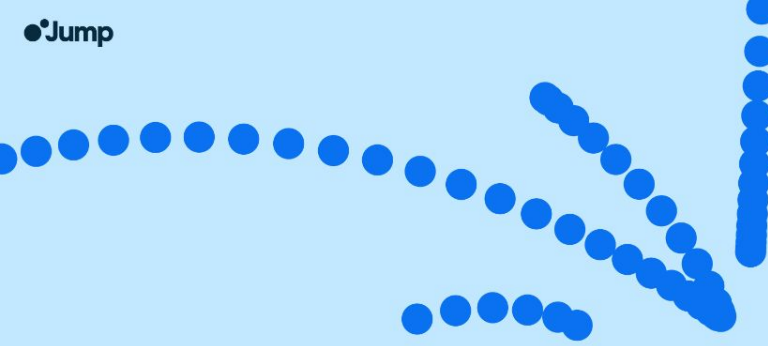
# What does the future look like...



# Hype or Real? It's REAL

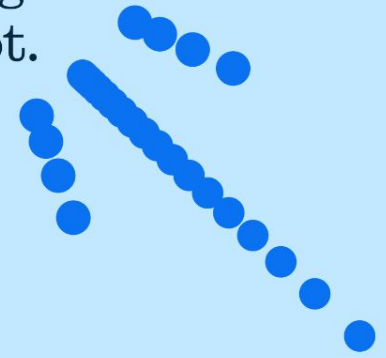
---



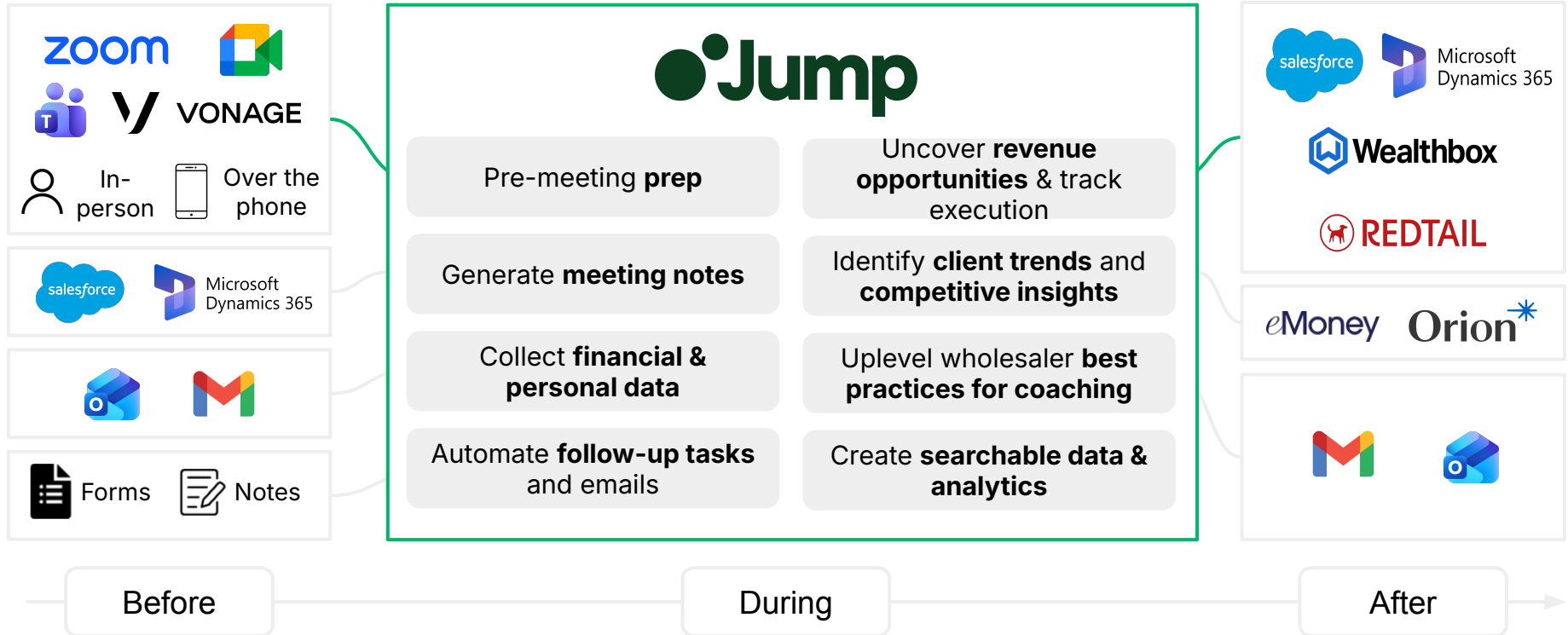


Jump is how distribution teams cut meeting  
admin time by 90% while elevating the  
Wholesaler and FinPro experience by putting  
notes, tasks, and collaboration on AI autopilot.

MADE FOR FINANCIAL PROFESSIONALS, EASY SETUP,  
CUSTOMIZABLE. SECURE + COMPLIANT, WORKS WITH  
YOUR SOFTWARE.

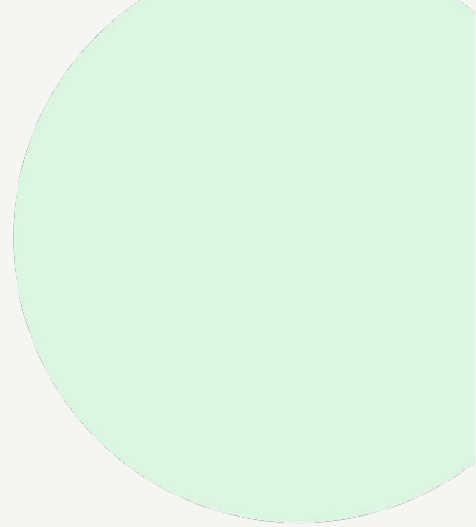


# Jump: The AI-Enhanced Client Meeting Cycle





**LIVE DEMO**



# What wholesalers are telling us.

---

## WHOLESALEERS SAY

*“I leave a meeting and immediately try to make mental notes of what was important.”*

---

*“My internal wants to help, but they're working off incomplete or delayed info and sometimes it's easier to handle it myself.”*

---

*“After 5 or 6 meetings in a row, everything starts to blur together.”*

---

*“I spend nights and weekends sending follow-ups and catching up on admin activities.”*

## WHAT THEY'RE ASKING FOR

### 01 Prepared

I want to show up prepared for meetings and be 100% present, not writing notes or relying on memory.

---

### 02 Post-meeting tasks completed

After meetings I want CRM notes, my activity logged, personalized recap emails pre-written, and follow up tasks identified and assigned to my internal team.

---

### 03 Finished when I leave the office

I spend my nights and weekends doing this right, and I want it done when I leave the advisor's office.

# What Leaders Want.

---

More than time savings

*“Efficiency is fine, but I am accountable for net flows. Show me how this drives advisor engagement, product adoption, and organic growth.”*

---

Field intelligence & trends

*“By the time we read the research report, the moment has passed. We need to know what clients are worried about as it is emerging.”*

---

Coaching & enablement

*“Our sales managers cannot sit on every wholesaler call. We need quantitative signals that show where execution is breaking down and how to scale what top performers do.”*

---

Competitor intelligence

*“Across thousands of meetings, which competitors are coming up, and why are advisors choosing them over us?”*

---

Product propensity

*“Which advisors are most likely to move on a product, what is the right fit for their book, and when is the moment to engage?”*

---

# Built for teams that sell through advisors.

Jump is designed for teams whose growth depends on high-quality meetings, fast follow-up, clean CRM activity, and insight into what the field is hearing.

## ROLE 01

---

### External wholesalers

Prep for advisor meetings, capture in-person and virtual conversations, and leave with follow-up already drafted.

## ROLE 02

---

### Internal partners

See context immediately, support next steps faster, and reduce the back-and-forth after advisor meetings.

## ROLE 03

---

### Distribution leaders

Understand product interest, objections, advisor needs, and coaching opportunities across territories.

# From advisor prep to CRM follow-through.

A single thread across every advisor relationship — context before the meeting, capture during it, and CRM-ready output the moment it ends.

## 1 BEFORE

### Brief.

AI brief on advisor context, open cases, prior conversations, and likely product interests.



## 2 DURING

### Capture.

Capture advisor meetings across in-person, phone, and virtual settings with configurable compliance controls.



## 3 AFTER

### Follow through.

Generate follow-up, tasks, notes, and CRM activity while the conversation is still fresh.

## THE RESULT

Fewer stale notes, faster advisor response, and cleaner data for the home office.

# Signals.

- 
- 01 Which advisors are showing interest in specific products?

---

  - 02 Where are cases stalling after education or proposal review?

---

  - 03 What objections are showing up by region, channel, or product?

---

  - 04 Which advisor conversations suggest training, content, or cross-sell opportunities?

OUTPUT

FOR LEADERS

## A repeatable intelligence layer for the field.

Real-time, conversation-level signal rolled up to the territory and product level — not buried in CRM notes.

- Coaching
- Enablement
- Product strategy



# Productivity for reps. Visibility for leaders.

01

## Time back

Reduce end-of-day admin by generating notes, follow-up, and CRM updates from the conversation.

FOR REPS

02

## Better collaboration

Give internal partners the context they need without relying on manual summaries.

FOR REPS

03

## Cleaner CRM

Improve timeliness and completeness of advisor activity and relationship history.

FOR REPS

04

## Coach at scale

Identify what strong wholesalers do differently and where teams need support.

FOR LEADERS

05

## Product insight

See product perception, objection patterns, and emerging demand across the field.

FOR LEADERS

# Conversational Intelligence - What is actually being talked about?

### What's trending Client topics ▾

Topics with the largest change in growth compared to the previous period. Click a topic to view the detailed meeting breakdown.

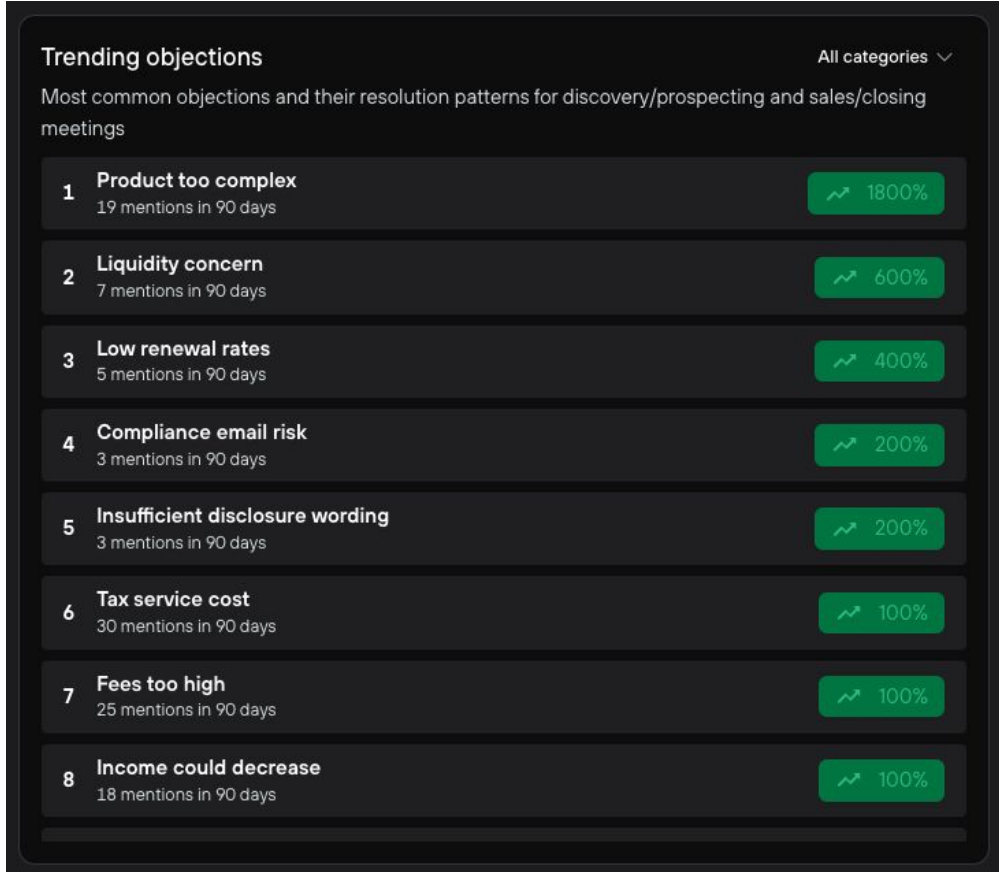
1	<b>Long-term care insurance</b> 10 mentions this month	↗ 100%
2	<b>Annuities</b> 6 mentions this month	↗ 100%
3	<b>401(k) optimization</b> 6 mentions this month	↗ 100%
4	<b>Pension planning</b> 6 mentions this month	↗ 100%
5	<b>Systematic withdrawal</b> 6 mentions this month	↗ 100%
6	<b>Sequence risk</b> 5 mentions this month	↗ 100%
7	<b>Wealth transfer</b> 4 mentions this month	↗ 100%
8	<b>MYGA</b> 4 mentions this month	↗ 100%

### Most talked about Client topics ▾

Topics with the highest mention counts. Click a topic to view the detailed meeting breakdown.

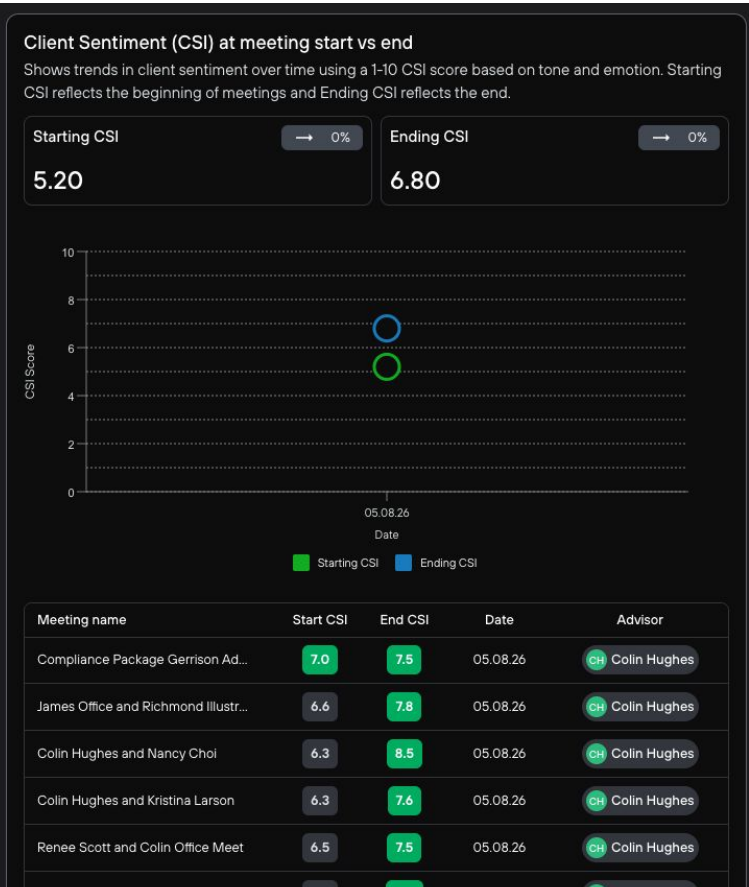
1	<b>Asset rebalancing</b> 15 mentions this month	↗ 66.7%
2	<b>Yield optimization</b> 11 mentions this month	↗ 57.1%
3	<b>Strategic allocation</b> 8 mentions this month	↘ -11.1%
4	<b>Concentration risk</b> 7 mentions this month	↗ 16.7%
5	<b>Sector allocation</b> 7 mentions this month	↗ 16.7%
6	<b>Benchmark comparison</b> 7 mentions this month	↗ 40%
7	<b>Downside protection</b> 6 mentions this month	↗ 100%
8	<b>Annuities</b> 6 mentions this month	↗ 500%
9	<b>Tactical allocation</b> 6 mentions this month	↗ 20%
	<b>Volatility management</b>	

# Conversational Intelligence - How are advisors responding?





# Conversational Intelligence Built for Leaders - Client Sentiment





# Conversational Intelligence Built for Leaders - Product Mentions

## Product Focused Discussions

Download CSV

Generate report

Track what types of products are discussed in meetings?

Data last updated: 5/8/26 04:31pm

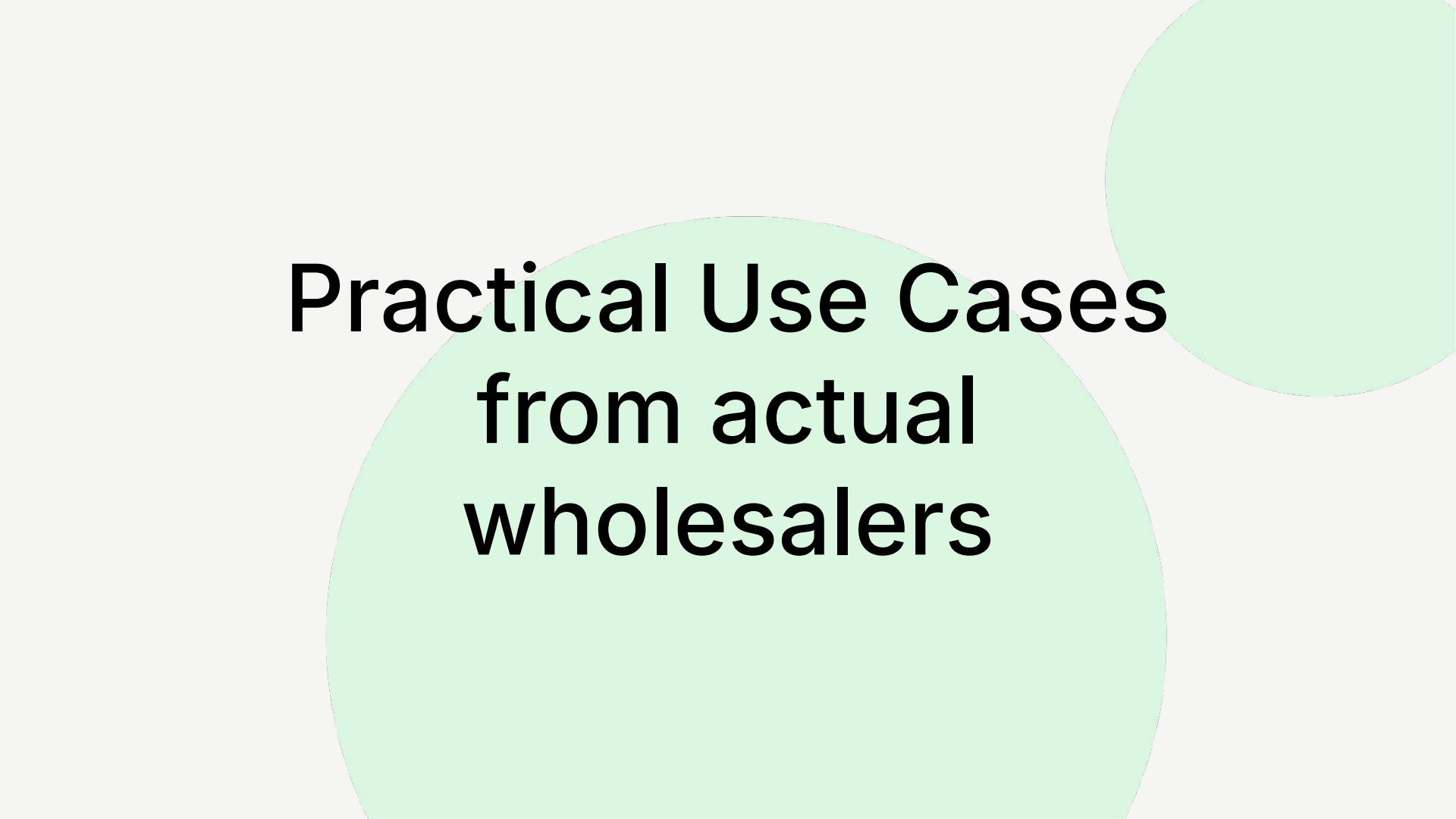
Filter by All time All users Meeting category Meeting type

### What Specific Annuities Products Were Discussed?

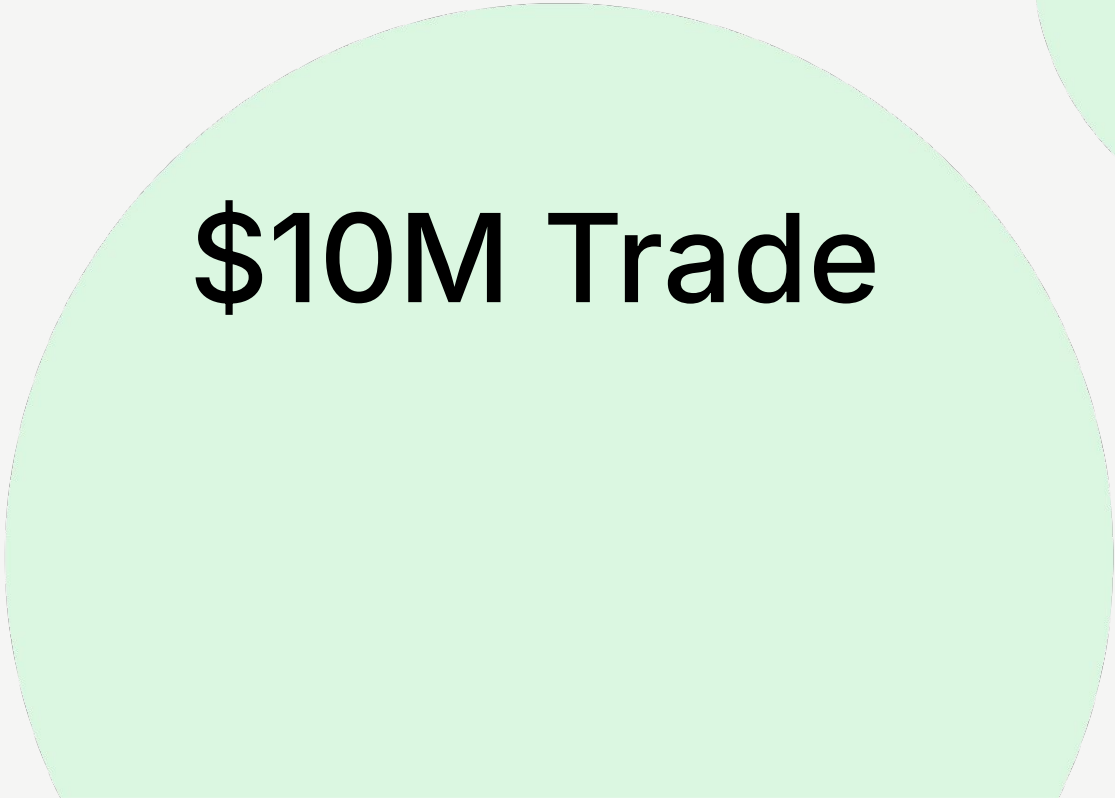
Out of 49 meetings

Options

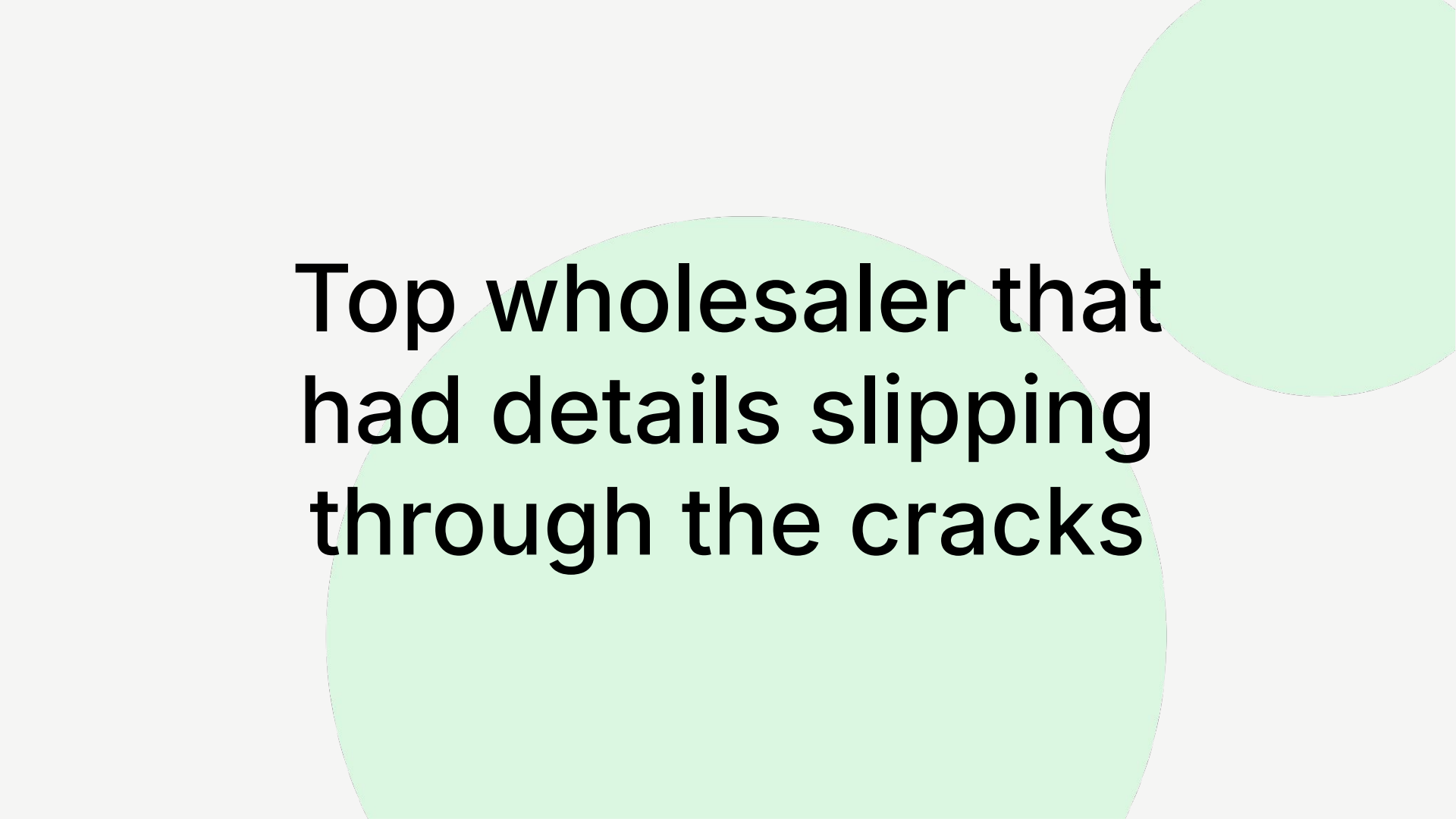
MYGA – Multi-Year Guaranteed Annuity	42.7% (94 mentions, 32 meetings)
FIA - Fixed Indexed Annuity-	33.2% (73 mentions, 26 meetings)
SPIA – Single Premium Immediate Annuity	17.7% (39 mentions, 19 meetings)
VA – Variable Annuity	6.4% (14 mentions, 11 meetings)
N/A	0% (0 mentions, 0 meetings)



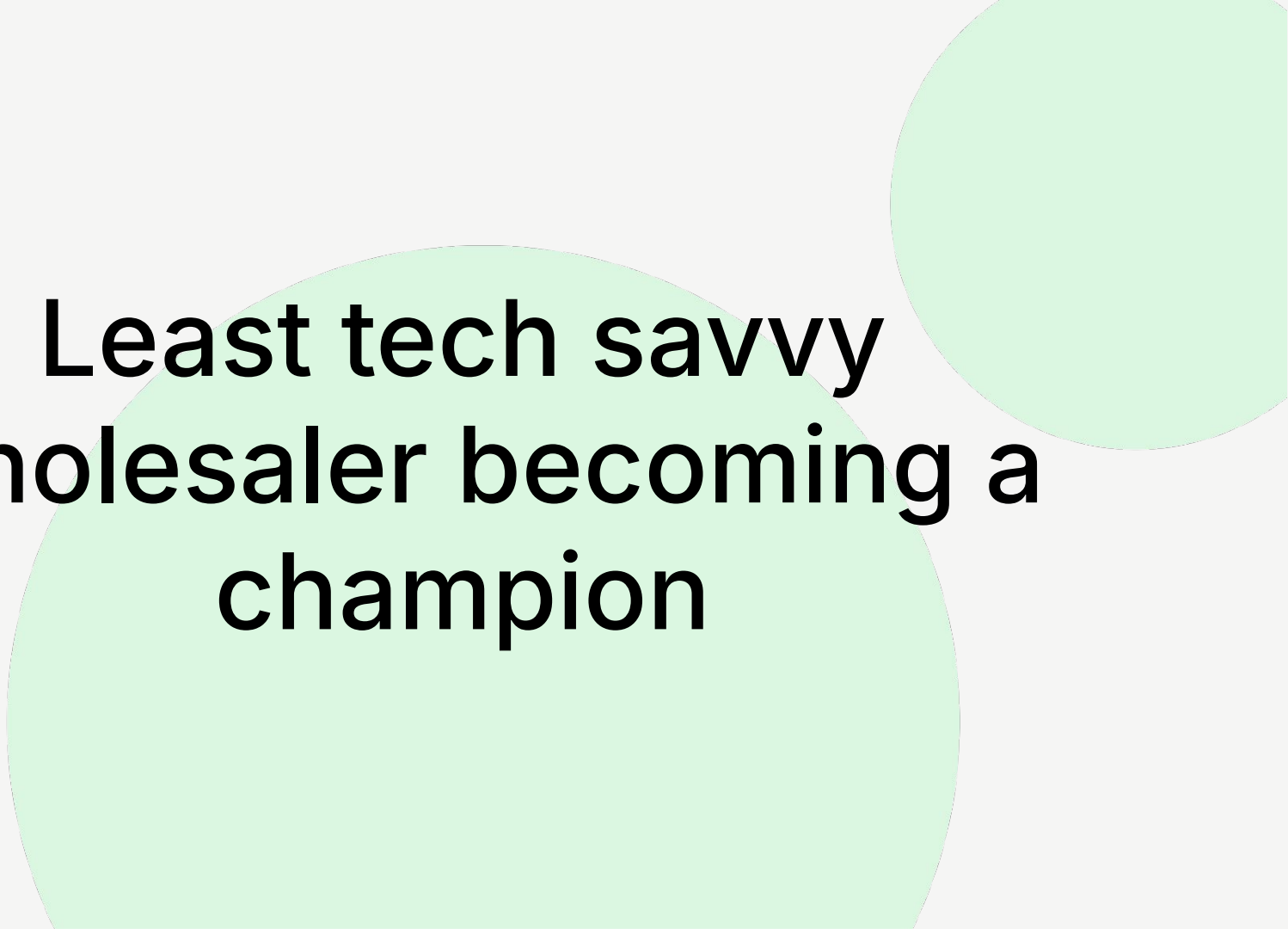
# **Practical Use Cases from actual wholesalers**



**\$10M Trade**



**Top wholesaler that  
had details slipping  
through the cracks**

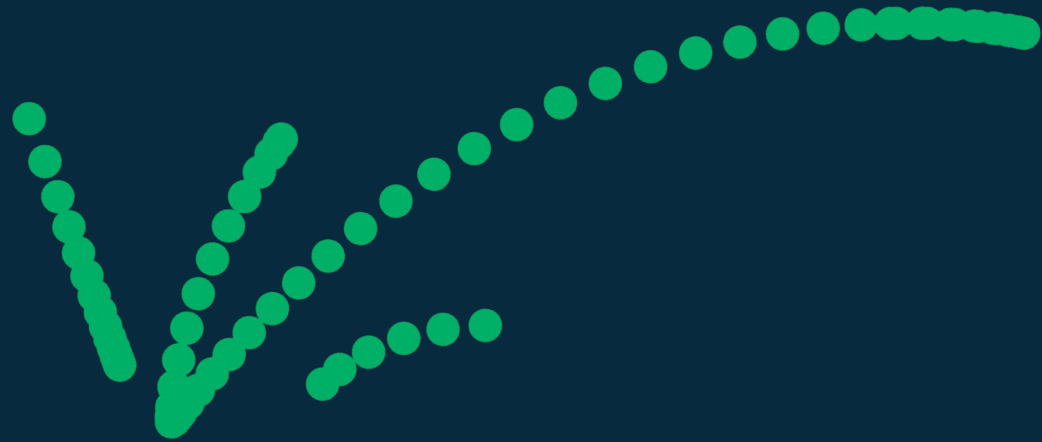


**Least tech savvy  
wholesaler becoming a  
champion**



# Work-Life Balance for your Wholesalers





# Preston Hunter

General Manager, Jump Grow  
Jump.ai  
preston@jump.ai

