

Carver Financial Team Tech Stack & Beta

Please note not all applications are approved for use by RJ advisors. For what is approved or to apply, utilize RJ Net.

- [Enhanced Branch Third-Party Supplier Request Process](#)
 - *RJnet page outlines what the review process entails, Branch Manager/Branch Supervisor responsibilities, exemptions to policy, & differences between suppliers on the Preferred list vs. those notated as approvable, but non-preferred.*
- [NEW Submission Form](#)
 - *Type ahead the Product Name to see whether a product has been previously reviewed, whether it is approvable and anticipated conditions of use*
- [RJFS Supplier Solutions Directory](#) outlines RJ Provided tools/services and tools/services on the Preferred Supplier List.

Dedicated support: Third-PartySuppliers@raymondjames.com

AI & Tech Stack

Salesforce – Financial Services Cloud for CRM

Salesforce Financial Services Cloud is a client relationship management (CRM) platform built specifically for financial professionals. It enables firms to unify client information, automate workflows, and deliver personalized advice at scale.

Website: <https://www.salesforce.com/solutions/industries/financial-services/overview/>

JUMP

An AI Operating System That Partners With You Throughout Your Day

Jump provides full meeting intelligence for financial professionals, **saving advisors 10+ hours per week, providing the highest level of compliance, and deepening relationships with clients.**

BEFORE the meeting

- Instantly surfaces prior notes and client context
- Helps you walk in prepared, focused, and confident

DURING the meeting

- Securely transcribes or summarizes conversations in real time
- Identifies key decisions, action items, and commitments
- Creates clean, structured, compliant-ready notes automatically

AFTER the meeting

- Generates follow-up tasks and next steps—no manual work
- Produces CRM-ready notes and client-friendly summaries
- Cuts admin time dramatically while improving consistency

What Makes JUMP Different

- **Full customization** - How your meetings are recorded to integrations and everything between
- **Insights** - Specific recommendations for how to maximize interactions with your clients
- **Integrations** - Works with the tools you already use

Jump empowers you to deepen client relationships, accelerate firm growth, and run a more efficient, modern practice.

Website: <https://jumpapp.com/raymond-james>

There is both a Raymond James discount and a special Randy discount available. All accounts created through the link below will receive 10% off and be placed under the Raymond James configuration.

Additionally, users who choose annual billing—will receive one extra month free:

<https://my.jumpapp.com/signup/randy-carver-elevate>

Reach out to Brett Kernodle - brett.kernodle@jumpapp.com or direct number: 501-388-0474.

TaxStatus – Unlock Hidden Assets. Strengthen Client Relationships.

TaxStatu is a FinTech platform that delivers frictionless **Verified Financials directly from the source of truth—the IRS**. With secure, client-consented access to tax data, advisors gain visibility into a client’s complete financial picture, including **held-away investment accounts, business entities, and property ownership**.

Through **TaxStatus Financial Baseline reporting and client-specific tax intelligence**, you know everything that the IRS knows, not just what a client reports on their tax return. You gain the clarity needed to deliver more holistic, fiduciary advice. This deeper insight enhances planning conversations, improves coordination across investments and taxes, and enables more confident, personalized recommendations. **The result: stronger client relationships, increased wallet share, and more organic growth through referrals.**

TaxStatus also helps you stay proactive. The platform continuously monitors your clients’ IRS account records and alerts you to new activity—such as filings, IRS notices, audits, identity fraud, penalties, or refunds - so there are no surprises.

Data security is always a top priority. TaxStatus is fully compliant with **SOC 2, KYC/KYB, and AML standards**, ensuring strong security, privacy, and regulatory alignment.

For a demonstration or additional information, contact **Browning Mank**, Head of Sales at TaxStatus, Inc., at **(972) 971-3132** or browning@taxstatus.com.

Holistiplan Holistiplan automates the process of reviewing tax returns and generating client-ready reports, making it easier for advisors to identify planning opportunities and provide tax-focused advice.

Website: <https://www.holistiplan.com>

Calendly – Scheduling & Appointments

Calendly is a user-friendly online scheduling tool that helps individuals and teams streamline appointments

without the back-and-forth emails. It integrates with calendars and supports automated reminders.

Website: <https://www.calendly.com>

Powder – Document Scanning

Powder is a high-speed, secure AI document scanning solution ideal for converting physical documents into digital format for analysis, storage, sharing, and compliance. A core example is parsing and enriching prospective clients' brokerage statements (pdfs, faxes, scans, screenshots) to eliminate the need for manual copying and pasting.

Website: www.powderfi.com

10% discount if you use my name or RJ2025

Website: <https://www.powder.tech>

Contact is Dominic Tully - dominic@powderfi.com

FP Alpha – The AI-Driven Estate, Tax and Insurance Planning Solution

FP Alpha is a comprehensive AI-driven planning tool that helps advisors deliver estate, tax, insurance, and long-term care insights to all their clients. The platform is extremely user friendly and is a top solution according to Michael Kitces and the T3 Survey. Advisors simply drag and drop a client's documents into the platform and FP Alpha reads those documents, produces a visual summary, and insights which are highly personalized to the client's situation. FP Alpha also has an award-winning estate lab and tax simulator for advisors who want to run different scenarios. FP Alpha's NextGen Tax Insights, which are fully powered by AI, have been "*an absolute game changer*" for advisors who are using them, and show tax reduction opportunities. FP Alpha hits the "easy button" on a historically manual and extremely time intensive planning process that was only reserved for the wealthiest clients. As a result, FP Alpha helps financial advisors grow and scale their practice, bring in and close more prospects, retain assets with next-gen clients, protect their client's net worth through insurance planning, and offer these services to more of their clients (mass affluent to ultra-high net worth).

For Raymond James advisors that sign up by the end of the month, we can offer a 20% discount off their first-year membership. If interested, please reach out to our Sales Director, Max Golden mgolden@fpalpha.com, to schedule your demo today. Website: <https://www.fpalpha.com>

Grok – AI Assistant

Grok is an AI-powered assistant created by xAI (Elon Musk's company), designed to provide conversational answers, research, and insights by accessing up-to-date information.

Website: <https://x.ai>

ChatGPT – AI Assistant

ChatGPT by OpenAI is a conversational AI that helps with content generation, summarization, research, planning, and general problem solving across a wide range of topics.

Website: <https://www.openai.com/chatgpt>

Deepvest.ai – Portfolio tool – under Beta right now

Other Resources

Synesthesia – AI Avatars – Text to Video

Veed.io- Make Professional Quality Videos

Pictory.ai – Any text into YouTube

Lumen5 – Turns any text into a Video

Syllaby.io - To make Video and Blog – works well with Claude

Humantic AI - LinkedIn personality profiles,

Ilovepdf.com – Manage PDFs

Grammar checkers and rewording tools ([Grammarly](#), [Wordtune](#), [ProWritingAid](#))

Image generation [DALL·E 2](#) & [Midjourney](#))

Transcription and meeting assistants - Otter

Email inbox management - Superhuman & [SaneBox](#)

Slide decks and presentations - [Decktopus](#) & [Slidesgo](#)

Voice Generation: [ElevenLabs](#), [Murf](#)