

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

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 in 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.

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.

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 that 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 clients' 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 who 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>

Other Resources

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>

Claude Cowork is a collaborative workspace built around Claude, developed by Anthropic, that allows teams to work alongside AI in real time. It combines chat, document editing, and task support into a shared environment where multiple users can interact with Claude simultaneously brainstorming ideas, drafting content, analyzing data, or refining workflows together. The goal is to make AI a seamless “coworker” that enhances productivity, supports decision-making, and helps teams move faster with higher-quality output.

Happy Horse AI is an AI-powered video generation platform that turns simple text or images into high-quality, multi-scene videos with consistent characters, built-in audio, and realistic visuals. It’s designed to help businesses and creators quickly produce engaging marketing, social media, and storytelling content without the need for traditional video production.

Deepvest.ai – is an AI-powered investment research and portfolio analysis platform designed specifically for financial advisors. It uses advanced, data-driven AI to analyze portfolios, identify risks and opportunities, and generate client-ready insights and proposals in minutes—helping advisors make more accurate decisions, improve client outcomes, and scale their practice efficiently.

Synesthesia – AI Avatars – Text to Video

Veed.io- Make Professional Quality Videos

Loveable & Base 44 – for coding and app building

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](#)