



AI Investor Calls

AI INVESTOR CALLS

AI Voice Agents That Qualify Investor Lists
in Days, Not Weeks

WHAT WE DO

Fully managed AI voice agents built for alternative investment outreach. We handle everything — agent creation, voice optimization, compliance, and real-time lead delivery.

Smart Conversations

Listens, adapts, handles objections naturally

Scale to 30 Parallel

Qualify large lists in days, not weeks

Full Audit Trail

Recordings, transcripts, summaries on every call

Pre-Call Data Cleaning + Ongoing List Hygiene

Disconnect + reverse phone verification on upload, nightly rescan of active queues

Studio-Quality Voice

Natural, expressive — not a robocall

Auto Lead Scoring

Good, Later, Not Interested, Bad — sorted

Compliant by Design

DNC, business hours, data isolation built in



AUTOMATIC LEAD DATA CLEANING

Every list is cleaned before a single call is dialed — no more wasted spend on dead numbers.

Suppression Filter

DNC, government, deceased, toll-free, and disconnected numbers removed instantly

Bad Phone Cache

12M+ known-bad phones blocked on upload — no wasted calls, no billing

Good Phone Cache

4M+ pre-verified phones skip verification entirely — free cache hits

Reverse Phone Match

Name + address appended from 2M+ reverse records for better contact rates

Pay-and-Verify

Only unknown phones are billed, at pennies per phone

Deferred Queue

Stash small remainders and verify later in larger, cheaper batches

HOW THE CALLS WORK

Every call follows a proven, permission-based structure — natural conversation, not a script.

1

Permission Opener

Asks for 30 seconds.
Respects busy or DNC
instantly.

2

Benefits Pitch

Under 45 seconds.
Concrete, benefit-driven,
ends with an open
question.

3

Email Capture

Confirms best email for
the info package.

4

Qualification

Accredited status, sector
experience, liquidity,
occupation, state.

5

Schedule & Close

Books a 10-minute
follow-up with your team.

2-5 min

Typical Call

30

Parallel Calls

Natural

Pacing & Tone

INTELLIGENT LEAD SCORING

Every prospect is automatically classified so your closers focus on the hottest opportunities.

Good Lead

Qualified, interested, ready for immediate follow-up

Good For Later

Interested but not ready now — schedule a follow-up

Not Interested

Reached and declined — set aside

Bad Lead

Wrong number, DNC, disconnected — permanently removed

Non Accredited

Confirmed non-accredited — removed from queue

Dead Lead

Leads that have been called 8 times without a disposition



BATTLE-TESTED AT SCALE

Built on 3+ years of continuous optimization and millions of real conversations.

5.3M+

Calls Made

36+

Offerings Pitched

239+

Agents Tested

\$460K+

Capital Deployed

670K+

Transcripts Audited

3+

Years Running

SECTORS COVERED

Oil & Gas · Real Estate · Private Placements · Crypto · Pre-IPO · Precious Metals · Private Equity · Venture Capital · Medical Tech

WHAT 5.3 MILLION CALLS TAUGHT US

Insights from 3+ years, 239+ agent versions, and \$460K+ in R&D investment

1 Real Human Response Patterns

Exactly which pitches, voices, and pacing work. "Not interested" often means "not now" — asking about future timing converts many into warm leads.

2 What Breaks AI Agents

Adding complexity doesn't help — the worst decline (91% drop) came from well-intentioned "improvements." Strict guardrails on agent complexity are enforced.

3 Optimal Conversation Design

Through 239+ versions of testing, the exact conversation structure that maximizes qualification rates has been identified. Question order and rule placement matter.

4 Voice & Pacing Optimization

Multiple voice providers, styles, and speeds tested. The combinations that sound most natural and keep prospects engaged are known.

MANAGED SERVICE VS. DIY

Building an AI voice system requires 10+ separate systems. Here's what you avoid:

✗ DIY CHALLENGE

Months of development & integration

Hiring devs, AI engineers & voice specialists

Managing 5+ API providers & rate limits

Debugging robotic calls via trial & error

Building compliance (DNC, data, recordings)

Paying for failed experiments & QA

✓ OUR SERVICE

Ready to launch in days

One team handles everything

Fully managed infrastructure

Voices optimized through 5.3M+ calls

Built-in compliance from day one

\$460K+ already invested so you don't

YOUR CLIENT PORTAL

Secure, self-service dashboard — launch campaigns, track results, and export leads in real time.

In the portal you can:

- Upload lists with one-click column mapping + auto data cleaning
- Send runs and schedule dispatch across 8 call cycles
- Track monthly call and contact usage in real time
- See verification and scrub jobs live as they run
- Export filtered leads to Excel or email
- Buy credits and manage billing self-serve
- Request higher usage limits without leaving the dashboard
- Toggle cell-only mode to exclude landlines from campaigns

The screenshot displays the 'Results Overview' section of the client portal. It features four status cards: 'GOOD LEADS' (0), 'GOOD FOR LATER' (0), 'NOT INTERESTED' (0), and 'BAD LEADS' (0). Below these is a 'MONTHLY USAGE' section for 2026-04, showing 0 / 30,000 calls. A 'Total Calls Made: 0' indicator is present, along with 'Export Good Leads' and 'Export All Calls' buttons. A central green box indicates 'TIME BEFORE NEXT SEND' with the word 'Ready' and the message 'You can send calls now'. The 'Send Calls' section shows 8 runs, each with 0 available calls. At the bottom, 'Call Settings' are visible, including 'Recall Days (No Answer)' set to 5, 'Recall Days (Answered)' set to 30, 'Window Start (CST)' at 09:00 AM, and 'Window End (CST)' at 05:00 PM. A 'Save Settings' button is located at the bottom left of the settings area.

REAL RESULTS LIVE DATA

Leads flow into a real-time Google Sheet with full detail:

- Name
- Contact Info
- Accreditation
- Call Summary
- Recording Link
- Quality Score

A	B	C	D	E	F	G	H	I	J	K	L	M
Date	First Name	Last Name	Phone	Address	City	Input State	Slate Given	Zip	Input Email	Email Given	Accredited	Interested
4/1/2026 19:15:10	Nathan	Example	2145551111	1111 Main	Oil Springs	KY	KY	41076	test@example.com	test@example.com	TRUE	TRUE
4/1/2026 19:00:50	Ian	Example	2145551111	1111 Main	Mooresville	NC	NC	28117	test@example.com	test@example.com	TRUE	TRUE
3/31/2026 19:29:58	Mark	Example	2145551111	1111 Main	Chapel Hill	NC	NC	27517	test@example.com	test@example.com	TRUE	TRUE
3/31/2026 19:10:42	Gian	Example	2145551111	1111 Main	Sacramento	CA	CA	95821	test@example.com	test@example.com	TRUE	TRUE
3/31/2026 18:12:48	Michael	Example	2145551111	1111 Main	Lusby	MD	MD	20657	test@example.com	test@example.com	TRUE	TRUE
3/30/2026 20:04:59	Joshua	Example	2145551111	1111 Main	Juneau	AK	AK	99801	test@example.com	test@example.com	TRUE	TRUE
3/27/2026 20:02:11	Eric	Example	2145551111	1111 Main	Sanmanish	WA	WA	98075	test@example.com	test@example.com	TRUE	TRUE
3/27/2026 19:23:29	Stephen	Example	2145551111	1111 Main	Lakeville	ME	ME	4487	test@example.com	test@example.com	TRUE	TRUE
3/27/2026 0:38:11	Robert	Example	2145551111	1111 Main	Tomball	TX	TX	77377	test@example.com	test@example.com	TRUE	TRUE
3/26/2026 21:33:51	Paul	Example	2145551111	1111 Main	Anchorage	AK	AK	99516	test@example.com	test@example.com	TRUE	TRUE
3/18/2026 18:40:04	Michael	Example	2145551111	1111 Main	Houston	TX	TX	77042	test@example.com	test@example.com	TRUE	TRUE
3/18/2026 18:07:09	Jerry	Example	2145551111	1111 Main	Harrodsburg	KY	KY	40330	test@example.com	test@example.com	TRUE	TRUE
3/18/2026 18:04:16	Sean	Example	2145551111	1111 Main	Vancouver	WA	WA	98684	test@example.com	test@example.com	TRUE	TRUE
3/17/2026 18:05:13	Scott	Example	2145551111	1111 Main	Piano	TX	TX	75025	test@example.com	test@example.com	TRUE	TRUE
3/16/2026 19:34:30	Shawn	Example	2145551111	1111 Main	Randolph	NJ	NJ	7869	test@example.com	test@example.com	TRUE	TRUE
3/12/2026 19:12:01	Matthew	Example	2145551111	1111 Main	La Jolla	CA	CA	92038	test@example.com	test@example.com	TRUE	TRUE
3/12/2026 18:04:52	Scott	Example	2145551111	1111 Main	Blanco	TX	TX	78606	test@example.com	test@example.com	TRUE	TRUE
3/11/2026 21:03:42	Alexander	Example	2145551111	1111 Main	Woodland	MIN	MIN	55391	test@example.com	test@example.com	TRUE	TRUE
3/10/2026 20:20:30	Tom	Example	2145551111	1111 Main	Clermont	FL	FL	34711	test@example.com	test@example.com	TRUE	TRUE
3/10/2026 20:10:07	Patrick	Example	2145551111	1111 Main	Rutherford	TN	TN	38369	test@example.com	test@example.com	TRUE	TRUE

N	O	P	Q	R	S	T	U	V
New Investments	Liquid To Invest	Job	Follow Up	Summary	Quality	Recording	Call Time	Correct Name
now	TRUE	Lawyer	After 4 PM Eastern	Spoke to a prospect who agreed to review the dea	Good	https://dxc03zqudy9.cloudfn	205	prospect react
now	TRUE	Tech and sales, software side	Late evening	Spoke to a prospect who was curious about what I	Good	https://dxc03zqudy9.cloudfn	305	prospect react
now	TRUE	Retired	Anytime during the day	Spoke to the prospect who was open to reviewing	Good	https://dxc03zqudy9.cloudfn	156	Prospect Reac
now	TRUE	Working commercial real estab	Friday at 10:00 AM	Spoke to Jordan who agreed to review the opportu	Good	https://dxc03zqudy9.cloudfn	193	Prospect Reac
now	TRUE	Owner of an automotive and Monday at 5		Spoke to Tony who confirmed interest in reviewing	Good	https://dxc03zqudy9.cloudfn	163	Prospect Reac
now	TRUE	Builds houses and does sto	Next week	Spoke to Bernard who agreed to review the prosp	Good	https://dxc03zqudy9.cloudfn	189	Prospect Reac
now	TRUE	General Manager / Vice Pre	Midmorning	Spoke to the prospect who agreed to review the dr	Good	https://dxc03zqudy9.cloudfn	62	Prospect Reac
now	TRUE	Retired	Tomorrow at 2:00 (prospect's locc	Spoke to the prospect who asked for details to be	Good	https://dxc03zqudy9.cloudfn	278	Prospect Reac
now	TRUE	Aerospace Engineering	Morning	Spoke to Tony who asked for details by email and	Good	https://dxc03zqudy9.cloudfn	213	Prospect Reac
now	TRUE	IT	Around 4:00 PM Eastern time late	Spoke to the prospect who was open to taking a lo	Good	https://dxc03zqudy9.cloudfn	249	Prospect Res
now	TRUE	Dispatch	Morning at 9 o'clock	Spoke to Paul who agreed to review the Storage C	Good	https://dxc03zqudy9.cloudfn	183	Prospect Reac
now	TRUE	Vice President for a health	Weekdays only, not weekends.	Spoke to Kent who confirmed he is accredited and	Good	https://dxc03zqudy9.cloudfn	160	Prospect Reac
now	TRUE	CFO of a publicly traded cor	Monday at 11:00	Spoke to the prospect who agreed to look at the dr	Good	https://dxc03zqudy9.cloudfn	290	Prospect Reac
now	TRUE	Works at a software develop	Tomorrow afternoon (time not cor	Spoke to Steven, who confirmed he is an accredite	Good	https://dxc03zqudy9.cloudfn	176	Prospect Reac
now	TRUE	Earthwork contractor	Monday afternoon	Spoke to Keith who was receptive to the pitch and	Good	https://dxc03zqudy9.cloudfn	146	Prospect Reac
now	TRUE	Self-employed	Tomorrow after 3 PM Eastern	Spoke to Brian who was briefly distracted but open	Good	https://dxc03zqudy9.cloudfn	170	Prospect Reac
now	TRUE	Semi-retired CPA	Monday at 5:00 PM Eastern	Spoke to Michael who confirmed he is an accredite	Good	https://dxc03zqudy9.cloudfn	262	Prospect Reac
now	TRUE	Healthcare	Late tomorrow morning	Spoke to Mike who confirmed he is accredited and	Good	https://dxc03zqudy9.cloudfn	128	Prospect Reac
now	TRUE	Developer	Tomorrow at 3:30	Spoke to a retired prospect who agreed to look at I	Good	https://dxc03zqudy9.cloudfn	245	Prospect Res
now	TRUE	Investor primarily in real est	Next week, anytime	Spoke to Marvin who agreed to review but had diffi	Good	https://dxc03zqudy9.cloudfn	212	Prospect Res

SIMPLE, TRANSPARENT PRICING

One-Time Setup

\$2,500

Custom agent, knowledge base, voice setup, testing & deployment

Monthly Platform

\$500/mo

Portal, hosting, phone number, recordings, real-time sync & support

First-time bonus: 2,500 free call credits included

Option 1: Per-Call Billing

Package	Credits	Price
2,500 calls	\$375	\$0.15/call
5,000 calls	\$750	\$0.15/call
10,000 calls	\$1,400	\$0.14/call
20,000 calls	\$2,700	\$0.135/call

Option 2: Per-Contact Billing

Package	Credits	Price
150 contacts	\$525	\$3.50/ea
300 contacts	\$1,050	\$3.50/ea
600 contacts	\$2,040	\$3.40/ea
1,200 contacts	\$3,960	\$3.30/ea

Lead Data Cleaning

Service

Disconnect scrub

Disconnect + reverse phone

Per-Call Client

\$0.004 / phone

\$0.025 / phone

Per-Contact Client

Included

\$0.029 / phone (required)

INVESTOR DATA SUPPLY

Need leads to call? JAD Enterprises supplies pre-qualified accredited investor data across all major sectors.

Real-Time Leads

\$5.00/lead · 2–14 days old

Phone-qualified by in-house Dallas team. Verified liquid assets.

Premium Leads

\$0.50/lead · 6–12 months old

Sourced from investment pitch rooms. Accredited and interested.

Dialer Leads

\$0.05–\$0.25 · 1–4 years old

High-volume lists, regularly scrubbed. Ideal for AI campaigns.



QUALITY GUARANTEE

Disconnected numbers, non-accredited contacts, deceased, and duplicates replaced at no cost.

GET STARTED

- 1 Complete the client questionnaire at investorcalls.ai/questionnaire
- 2 Pay the \$2,500 one-time setup fee
- 3 Share your materials & approve the agent draft
- 4 Launch your first campaign

Try a Live Demo Call → investorcalls.ai/demo-call

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