



DONE-FOR-YOU INVESTOR OUTREACH

Full-Service Campaign

One team. Three channels. Qualified investor appointments on your calendar every week — live callers, Facebook marketing, and AI voice agents working the same list.

2026 EDITION

01 What Is Included

At JAD Enterprises we understand that your time is valuable. Our full-service campaign handles all the heavy lifting, so you can focus on what you do best — closing deals and growing your business.

Three channels run in parallel against the same investor list. Paid social brings in opt-ins, AI voice agents qualify volume no human team could reach, and live callers turn the best of both into booked appointments.

PILLAR ONE

Live Callers

A dedicated in-house American caller who learns your offering and works it full time, 20 business days a month.

PILLAR TWO

Facebook Marketing

Managed paid social producing opt-in accredited investor leads, delivered to you in real time.

PILLAR THREE

AI Calling

20,000 AI voice calls a month qualifying your list at a scale live callers cannot match.

Every Facebook opt-in and every interested AI-call result is followed up and called by a live caller.

Plus: Appointment Setting

Every interested investor is followed up, confirmed, and booked directly onto your calendar. Missed appointments are chased and rescheduled. This is included — it is not a separate line item.

OUR APPROACH

- **Lead Generation.** We kick-start the process by generating opt-in leads who are actively seeking new investment opportunities, so you are only talking to qualified prospects who are expecting your call.
- **Targeted Campaigns.** We leverage the power of Facebook to reach your potential clients. Detailed demographic and interest targeting ensures your message reaches the right audience.
- **Cost Efficiency.** Strategic use of digital platforms and AI calling keeps the cost per qualified lead down, giving you an efficient solution for growth.

THE INVESTMENT

\$18,500 of services in one package

\$15,000 / month

02 How It Works

A seven-step process, run end to end by one team. You come in at step six.

1 Consultation & Kickoff

You complete the Call Campaign Intake Form. Your representative reviews it with your materials, then meets you by phone or video to confirm exactly how the offering will be presented.

2 Social Ads Generate Opt-In Leads

Facebook campaigns go live against accredited investor audiences and lookalikes, producing investors who have raised their hand for information.

3 AI Voice Agents Qualify At Scale

Your AI agent works the wider investor list — 30 calls in parallel — sorting accredited, interested, and liquid prospects from the rest.

4 Live Callers Work The Best Leads

Your caller starts with social opt-ins and AI-qualified prospects, then moves on to our database of accredited investors with cold calls.

5 Follow-Up Calls To Interested Investors

A second caller confirms the prospect has reviewed your material, answers questions, and finds out what is holding them back if anything is.

6 Calendar Appointments Set For You

Once a prospect is financially ready and genuinely interested, we book them straight onto your calendar. You show up and close.

7 New Investor Funds

Every conversation, note, and recording sits in one real-time Google Sheet, so nothing is lost between the first ad impression and the wire hitting your account.

WHY IT WORKS TOGETHER

Running these three channels through one team means the ad audiences, the AI script, and the caller's pitch are all tuned from the same feedback. An investor who sees your Facebook ad, then speaks to an AI agent, then hears from a live caller has had three consistent touches — not three disconnected ones.

WHO DOES WHAT

We Handle

Ad accounts and creative, the AI agent build and tuning, list sourcing and cleaning, every outbound call, all follow-ups, objection handling, and calendar booking.

You Handle

Approving how the offering is pitched, showing up to the appointments we book, and closing. That is the whole list.

03 Live Callers

Your caller is an in-house American employee who learns your offering before dialing a single number, then works it full time.

Consultation Process

We begin with a detailed consultation to understand your investment. You fill out our Call Campaign Intake Form, and your assigned representative reviews it along with any additional materials you provide. That is followed by a phone meeting to discuss the offering and address any questions.

The Call Campaign

Once your caller is familiar with the offering, they begin contacting leads. They start with social media opt-ins and AI-qualified prospects, then move on to our database of accredited investors. Every lead is shared in real time via Google Sheets with detailed notes attached.

Follow-Ups

A second caller confirms the prospect has reviewed your information. Once a prospect confirms interest, we schedule them on your calendar. If a prospect loses interest, we work out why and relay their concerns back to you — that feedback is often worth more than the call itself.

Missed Appointments and Reconnections

If a prospect misses an appointment, your caller reaches out to reschedule. They can also help reestablish contact with any lead after your initial conversation.

WHAT YOUR CALLER DELIVERS

- **Monday through Friday, 20 business days** per month, on 40-hour weeks.
- **6 to 8 new leads per day** based on your qualifications, with detailed notes delivered in real time daily via Google Sheets.
- All leads and all calling expenses are covered by us. There is nothing extra to buy.
- Your caller works out the best follow-up time frames and days of the week for contact.
- You are given your caller's direct phone number and email for any question about any lead.

20 BUSINESS DAYS	40 HOUR WEEKS	6-8 LEADS PER DAY	Live GOOGLE SHEET DELIVERY
----------------------------	-------------------------	-----------------------------	--------------------------------------

04 Facebook & Social Marketing

On Facebook we use a combination of video and graphic ads with concise text bullets. Two campaign types are available.

Generic Ad Campaign

Targets accredited investors interested in alternative investment opportunities, run with creatives that already have an established track record.

Custom Ad Campaign

Tailored specifically to your investment opportunity. You supply the finished ads, or the text and graphics for us to build from.

Audience Targeting

We retarget our own comprehensive database of investor data, ensuring your message reaches people who have already shown investment behavior rather than a cold general audience.

Lookalike Audiences

We use lookalike modeling to reach new people who are likely to be interested in your offering because they resemble our known investor audience. As real conversion data comes back from your campaign, those audiences sharpen month over month.

Geography and Timing

We concentrate spend on top-performing zip codes and the best hours of the day, so the budget is working when investors are actually reachable.

NEGATIVE-AUDIENCE FILTERING

We apply negative-audience filtering to screen out non-accredited traffic, so your budget is not spent reaching people who cannot invest.

WHERE THE MONEY GOES

85% of the Facebook budget goes directly into Meta as ad spend — our management fee is inside the number you approve.

DELIVERY

Opt-in leads land in your real-time Google Sheet the moment they convert, complete with the information the investor submitted. Your caller picks them up the same day, while the interest is fresh.

05 AI Calling

AI voice agents that qualify investor lists in days, not weeks. Your campaign includes a custom-built agent and **20,000 AI calls per month**.

Smart Conversations

Listens, adapts, and handles objections naturally.

Studio-Quality Voice

Natural and expressive — not a robocall.

30 Parallel Calls

Qualify large lists in days, not weeks.

Auto Lead Scoring

Good, Later, Not Interested, Bad — sorted for you.

Full Audit Trail

Recording, transcript, and summary on every call.

Compliant by Design

DNC, business hours, and data isolation built in.

HOW THE CALLS WORK

#	STEP	WHAT HAPPENS
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 the best email address for the information package.
4	Qualification	Accredited status, sector experience, liquidity, occupation, and state.
5	Schedule & Close	Books a 10-minute follow-up with your team.

Qualified leads flow into your real-time Google Sheet with name, contact details, accreditation, call summary, recording link, and quality score — split into separate tabs by score so your callers know exactly where to start.

06 Appointment Setting

Generating interest is only half the job. The full-service campaign carries every interested investor all the way onto your calendar.

Confirmation Call

A second caller confirms the prospect has received and reviewed your material, and answers anything still outstanding.

Booked Directly To You

Once a prospect confirms interest, we schedule them straight onto your calendar at a time they committed to.

Objection Feedback

If a prospect cools off, we find out why and relay the reservation to you. Patterns in those answers change how the pitch is run.

No-Show Recovery

If a prospect misses their appointment, your caller reaches out to reschedule rather than letting the lead die.

Reconnections

Your caller can reestablish contact with any lead after your initial conversation, including ones that went quiet weeks ago.

One Source Of Truth

Every note, disposition, and recording lives in the same real-time Google Sheet your team already works from.

WHAT A BOOKED APPOINTMENT MEANS HERE

The prospect is financially ready, has reviewed your material, and has agreed to a specific time to talk about investing. We do not count a callback request as an appointment.

YOU STAY IN CONTROL

- You are provided your callers' direct phone number and email for any question about any lead.
- You can increase ad spend at any time if you want your callers working more opt-in leads.
- You can adjust the qualification bar mid-campaign — tighter criteria, fewer but stronger appointments.
- You are welcome to visit our office and watch the operation running firsthand.

07 What To Expect

We are committed to providing you with top-tier lead generation. Here is what a campaign month actually looks like.

6–8 NEW LEADS PER DAY	20–30 APPOINTMENTS MONTH ONE	20,000 AI CALLS PER MONTH	7 STEP PROCESS
---------------------------------	--	-------------------------------------	--------------------------

MONTH BY MONTH

Daily Leads

Your dedicated caller generates approximately 6 to 8 new leads per day based on your qualifications. Detailed notes are shared in real time daily via Google Sheets. On top of that, the AI caller generates an additional 2 to 4 leads per day who are interested and qualified for a later date — building your pipeline for the months ahead.

Monthly Appointments

In your first month you can anticipate around 20 to 30 appointments booked for you to speak directly with potential clients. These prospects are financially ready, have reviewed the material, and are prepared to seize the opportunity.

Continuous Growth

As we fill your pipeline with working prospects, appointment volume tends to increase in the second month and beyond. Ad audiences optimize on real conversion data and your callers get sharper on the offering.

Flexibility

You can increase your ad spend at any time if you want your callers working with more opt-in leads, or add a second caller as the pipeline grows.

WHY FULL-SERVICE BEATS FOUR VENDORS

- **One accountable team.** When ads, AI calling, and live callers report to the same manager, nobody gets to blame the other channel for a bad month.
- **Shared feedback loop.** What the callers hear on the phone rewrites the ad copy and the AI script within days, not quarters.
- **Cheaper than assembling it.** The same three services bought separately total \$18,500 per month before anyone coordinates them.
- **Compounding touches.** An investor who sees your ad, speaks to an AI agent, and then hears from a live caller converts at a different rate than one cold touch ever will.

08 The Package

Everything below is included. One monthly number, no setup charges layered on top, no per-appointment surcharges.

COMPONENT	STANDALONE PRICE
Caller	\$5,000
Facebook Marketing	\$7,500
AI Agent Creation	\$2,500
AI Calling Platform Fee	\$500
20,000 AI Calls	\$3,000
Value	\$18,500
Full Service Campaign Package	\$15,000 Per Month

Your saving against buying the same components separately

\$3,500 / month

WHAT THE MONTHLY NUMBER COVERS

Facebook ad spend

Included in the monthly investment — 85% of the Facebook budget goes directly into Meta.

All lead data

We supply the lists. You never buy leads separately for this campaign.

All calling expenses

Dialers, phone numbers, recordings, and AI call credits are covered.

Real-time reporting

Live Google Sheet delivery with notes, summaries, scores, and recordings.

Pricing effective July 2026. We recommend a minimum of two to three months — the second month is when audience data, caller familiarity, and AI agent tuning start compounding.

To get started — complete the Call Campaign Intake Form at jadenterprises.org/call-campaign-intake-form, or place your order directly at jadenterprises.org/new-order.



Contact Us Today To Learn More

Tell us what you are raising for and we will map out exactly how a full-service campaign would run for your offering — before you commit to anything.

PHONE

(214) 304-2168

EMAIL

info@jadenterprises.org

WEBSITE

jadenterprises.org

START YOUR CAMPAIGN

jadenterprises.org/new-order