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ACCREDITED INVESTOR MARKETING

# Investor Leads & Services

Verified accredited investor data, live call campaigns, social media advertising, and fully managed AI voice agents — delivered by one in-house American team.

2026 EDITION

## 01 Who We Are

JAD Enterprises builds investor pipelines for companies raising capital. We supply the accredited investor data, and we run the outreach that turns that data into conversations — live callers, paid social, and AI voice agents, all managed in one place.

Everything is done in-house. Our own American callers verify the lists before they are sold, our own team runs the ad accounts, and our own platform places the AI calls. You get one point of contact and one invoice instead of four vendors pointing at each other.

### SECTORS WE WORK IN

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

### WHERE OUR INVESTOR DATA COMES FROM

#### Paid Social Advertising

Ads targeting high-net-worth audiences across Facebook and LinkedIn.

#### Broker Fronts

Qualified investor "fronts" originating from brokers pitching live investment opportunities.

#### Investor Client Lists

Client lists of accredited investors who have already placed money into offerings.

#### Newsletter Opt-Ins

Traffic driven to investment newsletter and informational landing pages to collect opt-ins.

#### Our In-House American Cold Callers

Our own calling floor works business ownership records, voter registration information, and property ownership details inside affluent zip codes — qualifying each contact live before it reaches your list.

### WHAT MAKES US DIFFERENT

- Our dedicated team of in-house callers validates the authenticity of each list before it is made available for purchase.
- To ensure uniqueness, we cross-verify new orders against previous purchases, eliminating the possibility of duplicate leads.
- In the event of any issue, our team is readily accessible and committed to resolving concerns to the best of our ability.
- We maintain the integrity of our data by promptly replacing any disconnected numbers or non-accredited leads.
- We offer more than a list. Our services are designed to connect you with interested, liquid investors.
- We extend an open invitation for you to visit our office and witness our operations firsthand.

## 02 Lead Types & Qualification

Three lead products, priced by how recently the investor was qualified and by whom. Every type below is verified by our own callers before it is sold to you.

### Surveyed Leads **2 – 14 DAYS OLD**

**\$5.00 / lead**

Our in-house team makes outbound calls throughout the day identifying accredited investors who are actively looking for new opportunities. We confirm the investor holds liquid assets, learn what they have profited from before, and gauge how open they are to a new idea.

**QUALIFIED ON** — accredited status · actively seeking new opportunities · liquid assets confirmed · past profitable investments · openness to new ideas

### Fronted Leads **6 – 12 MONTHS OLD**

**\$0.50 / lead**

These investors were qualified by a broker as accredited and interested enough to have investment information sent to them for further consideration. Many have invested over the phone before and are active in several different opportunities. Our callers verify the information before any data is sold.

**QUALIFIED ON** — broker-qualified accredited · requested an information package · history of investing by phone · active across multiple deals · caller-verified before sale

### Dialer Leads **1 – 4 YEARS OLD**

**\$0.05 – \$0.25 / lead**

Built for teams running a dialer, small or large. These leads carry some age, but they originate from fronts and client lists, which raises the likelihood of reaching an active accredited investor. We update the database regularly, removing invalid numbers and dead contacts.

**QUALIFIED ON** — sourced from fronts and client lists · continuously scrubbed for invalid numbers · priced by age tier

### WHICH TYPE FITS YOU

#### Surveyed Leads

You have closers ready now and want the freshest, most recently qualified investor on the phone today.

#### Fronted Leads

You are feeding a live call team and need volume that has already been broker-qualified and caller-verified.

#### Dialer Leads

You are running a dialer or an AI calling campaign and need scale at the lowest cost per contact.

## 03 Lead Pricing

Lead pricing is set by freshness. Fresher data costs more because it was qualified more recently — and by a person.

| LEAD TYPE      | AGE            | PRICE PER LEAD |
|----------------|----------------|----------------|
| Surveyed Leads | 2 to 14 days   | <b>\$5.00</b>  |
| Fronted Leads  | 6 to 12 months | <b>\$0.50</b>  |
| Dialer Leads   | 1 to 2 years   | <b>\$0.25</b>  |
| Dialer Leads   | 2 to 3 years   | <b>\$0.10</b>  |
| Dialer Leads   | 3 to 4 years   | <b>\$0.05</b>  |

No minimum order quantity. Every order is cross-checked against your previous purchases so you never pay for the same lead twice. Pricing effective July 2026.

### REPLACEMENT POLICY

We maintain the integrity of our data by promptly replacing any disconnected numbers or non-accredited leads.

### WHAT EVERY LEAD ORDER INCLUDES

#### Caller-Verified Data

Our in-house callers validate the authenticity of each list before it is made available for purchase.

#### No Duplicates

New orders are cross-verified against your previous purchases, so you never pay for the same lead twice.

#### A Real Team Behind It

If something is wrong with an order, we are reachable and we fix it. You are welcome to visit our office and see the operation.

**Ready to order?** Place a lead order at [jadenterprises.org/new-order](https://jadenterprises.org/new-order) or request a custom quote at [jadenterprises.org/quote](https://jadenterprises.org/quote).

A dedicated in-house caller who learns your offering and works it full time, five days a week.

## STEP ONE — CONSULTATION

Our consultation process ensures we have a complete understanding of your investment before a single call is made. It also gives you the chance to speak with your assigned representative first.

### CONSULTATION SERVICE

**\$250** one-time

Fee is waived upon payment of a campaign.

1

#### Intake Form

We send you our Call Campaign Intake Form to detail your investment.

2

#### Representative Review

Your designated representative examines the completed form and any additional materials.

3

#### Phone or Video Meeting

We arrange a meeting once your representative understands the offering.

4

#### Your Sign-Off

You confirm the offering is being presented exactly as you want it.

## STEP TWO — THE CALL CAMPAIGN

### Call Campaign Service

**\$5,000** per month, per caller

- Your caller works **Monday through Friday for 20 business days**, on **40-hour weeks**.
- We supply all of the leads and cover all calling expenses. There is nothing else to buy.
- Expect **4 to 6 leads per day** from your caller based on your qualifications, with detailed notes delivered in real time through Google Sheets.
- Your caller works out the best follow-up time frame and days of the week for optimal contact results.
- You are given your caller's direct number and email for any questions or concerns.
- Need more volume? Add callers. Each additional caller is billed at the same monthly rate.

20

BUSINESS DAYS

40

HOUR WEEKS

4-6

LEADS PER DAY

Live

GOOGLE SHEET DELIVERY

## 05 Social Media Campaigns

### Social Media Marketing

**\$7,500** per month minimum

We primarily leverage the power of Facebook and LinkedIn. We can extend to other platforms as your campaign requires.

#### Facebook 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 offering. You supply the finished ads, or the text and graphics. A **\$250 creative design fee** applies if we design the ads for you.

#### LinkedIn Marketing

We use sponsored messages composed of text and web links. This works particularly well when job title is a significant factor for your offering — it ensures your complete message reaches the appropriate investors.

#### AUDIENCE TARGETING

We target our own comprehensive database of investor data, then use lookalike modeling to reach new people who resemble that audience. Positive targeting data we work with includes:

Fronted Investor Leads

Investor Client Lists

Small Business Owners

Crypto Account Holders

Stock Account Holders

Homes Valued Over \$500,000

Luxury Watch Buyers

Active Gamblers

Gun Buyers & Hunters

##### NEGATIVE-AUDIENCE FILTERING

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

Finally, we concentrate spend on top-performing zip codes and the best hours of the day. Leads from Facebook and LinkedIn are delivered in real time via Google Sheets, so you can follow up the moment someone raises their hand.

## 06 AI Calling Platform

AI voice agents that qualify investor lists in days, not weeks. Fully managed AI voice agents built for alternative investment outreach — we handle agent creation, voice optimization, compliance, and real-time lead delivery.

### ONE COMPANY, TWO NAMES

**AI Investor Calls** is the AI voice division of JAD Enterprises, delivered through the client portal at [investorcalls.ai](https://investorcalls.ai). Same team, same data, same phone number.

### WHAT YOU GET

|                                                                                  |                                                                              |                                                                                 |
|----------------------------------------------------------------------------------|------------------------------------------------------------------------------|---------------------------------------------------------------------------------|
| <b>Smart Conversations</b><br>Listens, adapts, and handles objections naturally. | <b>Studio-Quality Voice</b><br>Natural and expressive — not a robocall.      | <b>30 Parallel Calls</b><br>Qualify large lists in days, not weeks.             |
| <b>Auto Lead Scoring</b><br>Good, Later, Not Interested, Bad — sorted for you.   | <b>Full Audit Trail</b><br>Recording, transcript, and summary on every call. | <b>Compliant by Design</b><br>DNC, business hours, and data isolation built in. |

### HOW THE CALLS WORK

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

| # | STEP                        | WHAT HAPPENS                                                            |
|---|-----------------------------|-------------------------------------------------------------------------|
| 1 | <b>Permission Opener</b>    | Asks for 30 seconds. Respects busy or DNC instantly.                    |
| 2 | <b>Benefits Pitch</b>       | Under 45 seconds. Concrete, benefit-driven, ends with an open question. |
| 3 | <b>Email Capture</b>        | Confirms the best email address for the information package.            |
| 4 | <b>Qualification</b>        | Accredited status, sector experience, liquidity, occupation, and state. |
| 5 | <b>Schedule &amp; Close</b> | Books a 10-minute follow-up with your team.                             |

|                                |                             |                                  |                               |
|--------------------------------|-----------------------------|----------------------------------|-------------------------------|
| <b>2–5 min</b><br>TYPICAL CALL | <b>30</b><br>PARALLEL CALLS | <b>8</b><br>SEND CYCLES PER LIST | <b>100%</b><br>CALLS RECORDED |
|--------------------------------|-----------------------------|----------------------------------|-------------------------------|

## 07 AI Calling — Results & Pricing

Every prospect is automatically classified so your closers spend their time on the hottest opportunities.

| SCORE          | DEFINITION                                                |
|----------------|-----------------------------------------------------------|
| Good Lead      | Qualified, interested, and ready for immediate follow-up. |
| Good For Later | Interested but not ready now — scheduled for a follow-up. |
| Not Interested | Reached and declined — set aside.                         |
| Non Accredited | Confirmed non-accredited — removed from the queue.        |
| Bad Lead       | Wrong number, DNC, or disconnected — permanently removed. |
| Dead Lead      | Called 8 times without a disposition.                     |

Leads flow into a real-time Google Sheet with name, contact details, accreditation, call summary, recording link, and quality score. Tabs are split by score so nothing has to be sorted by hand.

### PRICING

| ITEM                    | PRICE                             | INCLUDES                                                                       |
|-------------------------|-----------------------------------|--------------------------------------------------------------------------------|
| AI Agent Creation       | <b>\$2,500</b><br>one-time        | Custom agent, knowledge base, voice setup, testing, and deployment.            |
| AI Calling Platform Fee | <b>\$500</b><br>per month         | Client portal, hosting, phone number, recordings, real-time sync, and support. |
| 20,000 AI Calls         | <b>\$3,000</b><br>\$0.15 per call | Call credits for your campaign. Larger volumes quoted on request.              |

First-time clients receive 2,500 free call credits. Pricing effective July 2026.

### AUTOMATIC LEAD DATA CLEANING

Every list is cleaned before a single call is dialed, so you are not paying to reach dead numbers.

|                                                                                                                |                                                                                                      |                                                                                                   |
|----------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|
| <b>Suppression Filter</b><br>DNC, government, deceased, toll-free, and disconnected numbers removed instantly. | <b>12M+ Bad Phone Cache</b><br>Known-bad phones are blocked on upload — no wasted calls, no billing. | <b>4M+ Good Phone Cache</b><br>Pre-verified phones skip verification entirely as free cache hits. |
|----------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|

Disconnect scrubbing from **\$0.004 per phone** · Disconnect + reverse phone append **\$0.025 per phone**. Only unknown phones are billed.

## 08 Full-Service Campaign

For clients who would rather concentrate solely on closing deals. We shoulder the prospecting so you only speak with people who have been vetted and have shown genuine interest.

### Live Callers

A dedicated caller working your offering full time and booking appointments on your calendar.

### Facebook Marketing

Managed paid social generating opt-in accredited investor leads every week.

### AI Calling

20,000 AI calls a month qualifying volume the human team could never reach alone.

| PACKAGE 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                 |
| <b>Value</b>                         | <b>\$18,500</b>         |
| <b>Full Service Campaign Package</b> | <b>\$15,000 / Month</b> |

You save **\$3,500 per month** against buying the same components separately. Full detail is in our **Full-Service Campaign Guide** at [jadenterprises.org/full-service-campaigns](https://jadenterprises.org/full-service-campaigns).

### HOW TO ORDER

1

#### Place Your Order

Go to [jadenterprises.org/new-order](https://jadenterprises.org/new-order) for leads and campaigns, or [/quote](#) for a custom quote.

2

#### Complete Your Intake

Call campaigns use the Call Campaign Intake Form. AI campaigns use the client questionnaire.

3

#### Approve The Pitch

Meet your representative, or review and approve your AI agent draft, before anything goes live.

4

#### Launch

Leads begin arriving in your real-time Google Sheet from day one of the campaign.

**Not sure which service fits?** Call **(214) 304-2168** and we will walk you through it. We will tell you honestly if a smaller service will get you there first.



## Contact Us Today To Learn More

Tell us what you are raising for and we will tell you exactly which data and which channel will get you in front of the right investors.

**PHONE**

**(214) 304-2168**

**EMAIL**

**[info@jadenterprises.org](mailto:info@jadenterprises.org)**

**WEBSITE**

**[jadenterprises.org](http://jadenterprises.org)**

**PLACE AN ORDER**

**[jadenterprises.org/new-order](http://jadenterprises.org/new-order)**