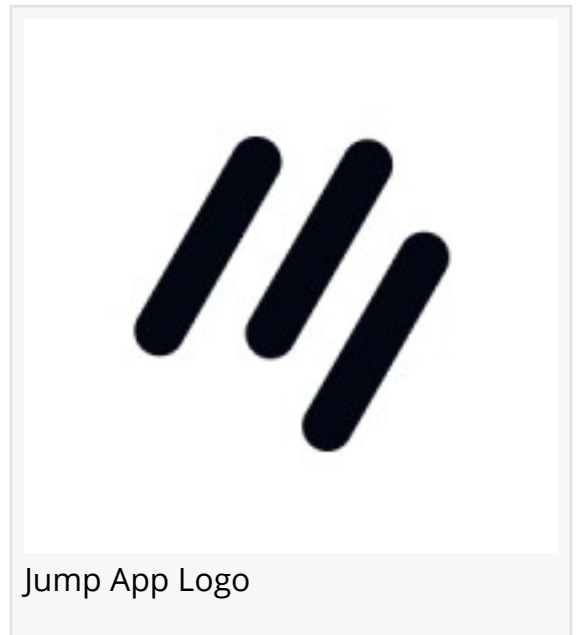


# Jump Announces Selection To LPL Financial Vendor Affinity Program

SALT LAKE CITY, UT, UNITED STATES, November 13, 2024 /EINPresswire.com/ -- [Jump](#), a leading provider of Artificial Intelligence solutions for [financial advisors](#), today announced a strategic relationship with LPL Financial, a leading wealth management firm. After a rigorous selection process, which considered product quality, scalability, data privacy security, AI capabilities and AI safety, Jump was selected to join LPL's Vendor Affinity Program, a curated list of preferred vendors that offer products and technology to LPL advisors.

As part of LPL's Vendor Affinity Program, Jump's advisor-friendly AI tools will be available to LPL's network of over 23,000 financial advisors, including advisors at approximately 1,000 institutions. LPL advisors will be

able to use Jump's AI platform which is designed to cut meeting-related admin time significantly and improve the client and advisor experience by putting meeting notes, CRM updates, client recap emails, financial planning data and task wrangling, and meeting prep on AI autopilot.



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“We are so excited to partner with LPL Financial as part of its Vendor Affinity Program,” said”

*Parker Ence, CEO at Jump*

“We are so excited to partner with LPL Financial as part of its Vendor Affinity Program,” said [Parker Ence](#), CEO at Jump. “We hear over and over from advisors that they’d like to show up to client meetings prepared without digging through old notes, be 100% present with clients instead of worrying about missing key information in their notes, and get all of the post-meeting follow-up done in five minutes instead of 50. It’s been incredibly exciting to see that

become a reality as we’ve built Jump, and we couldn’t be more excited to bring it to LPL advisors. LPL has long been a leader in investment advisory and wealth management and has shown total commitment to our shared vision of helping financial advisors everywhere thrive in the age of AI.”

“Whether it’s about deepening relationships or business development, advisors are looking for ways to redirect time from operational activities without compromising service excellence,” said

Kristie Edling-Day, executive vice president and chief information officer at LPL. “We look forward to seeing our advisors leverage Jump’s capabilities to achieve that win-win: greater efficiency and richer client relationships.”

Jump’s award-winning AI meeting assistant was built exclusively for financial advisors and based on input from hundreds of advisor teams. Jump features fully customizable outputs that match the advisor’s workflows and writing style, all with safety and compliance top of mind.

To learn more please visit: <https://www.lpl.com/news-media/press-releases/lpl-financial-launches-curated-ai-solutions-for-advisors.html>

For more information on how this integration can benefit your firm, please visit <https://jumpapp.com/>.

#### About Jump

Jump AI is the leading AI meeting assistant enabling RIA and Broker Dealer teams to cut meeting admin by 90% while elevating the advisor and client experience. Jump puts meeting prep, note taking, compliance documentation, CRM updates, client recap email, financial data extraction, and follow up tasks on AI autopilot so advisors can process meetings in 5 min, not 60. Jump is made for advisors, 100% customizable, deeply integrated with the tech stack, and designed with safety and compliance in mind. For more information, visit <https://jumpapp.com/>.

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