Trained Advisor Named an OpenAI Select Partner

Gilbert-based financial-advisor technology company expands its work deploying practical AI across advisor growth and operations



Trained Advisor has been named an OpenAI Select Partner, marking a new milestone in the company's work deploying practical AI solutions for financial advisors and insurance professionals.

GILBERT, AZ, UNITED STATES, October 1, 2026 /EINPresswire.com/ -- GILBERT, Ariz. — Trained Advisor, the company behind Advisor Nexus, an AI-enabled growth and operating platform for financial professionals, today announced that it has been named an OpenAI Select Partner within the OpenAI Partner Network.

The OpenAI Partner Network is a global program for partners to build, sell, and deliver AI solutions with OpenAI. It brings together partners with deep industry expertise, delivery capabilities, and customer relationships while equipping them with resources, enablement, and support to help enterprises adopt OpenAI frontier models and products and turn them into measurable impact.

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>
> *Joe Loebach, Partner & COO, Trained Advisor*

As an OpenAI Select Partner, Trained Advisor will continue working with OpenAI to help organizations build, deploy, and scale AI solutions responsibly and effectively. This work will help organizations put GPT-6 Astra to work across more of their business, using deeper reasoning and computer use to complete complex workflows and deliver finished work.

Trained Advisor specializes in applying AI to the day-to-day workflows of financial advisors and insurance professionals, including meeting intelligence, prospect research, advisor training, content systems, onboarding, sales operations, and CRM-integrated automation.

Founded by Tyson Bailey, Trained Advisor was built around a simple idea: financial professionals

need practical systems that create more conversations, improve follow-up, and make growth more consistent. Today, Bailey works alongside Partner and Chief Operating Officer Joe Loebach as the company expands that approach through Advisor Nexus, automation, data, and AI-powered workflows already in production.

As part of Trained Advisor's Partner Network onboarding process, the company identified 12 AI deployments already operating in production across customer-facing and internal workflows. Examples include meeting-intelligence systems that convert conversations into structured records and follow-up context, AI-powered prospect research, advisor roleplay and training tools, onboarding automation, and operational intelligence.

“AI is most valuable to us when it disappears into the workflow and simply helps people do better work,” said Joe Loebach, Partner and Chief Operating Officer of Trained Advisor. “We’ve focused on turning frontier AI into practical systems that help financial professionals prepare for conversations, understand prospects, follow up more consistently, train more effectively, and reduce repetitive work.”

Trained Advisor supports financial professionals with prospecting systems, operational technology, AI implementation, and Advisor Nexus, its CRM and advisor operating platform. The company combines CRM data, automation, AI models, meeting data, professional research, and advisor workflows to create systems designed around the practical needs of financial professionals.

Looking ahead, Trained Advisor plans to expand OpenAI-powered capabilities throughout Advisor Nexus, invest in technical enablement and practitioner certifications, and continue scaling production AI deployments for financial professionals.

To learn more about Trained Advisor, visit https://trainedadvisor.com.

To learn more about the OpenAI Partner Network, visit https://openai.com/business/partners/.

About Trained Advisor

Founded by Tyson Bailey and headquartered in Gilbert, Arizona, Trained Advisor helps financial advisors and insurance professionals use technology, data, AI, and systematic prospecting to create more consistent growth and more efficient operations. Its Advisor Nexus platform brings together CRM, outreach, workflow automation, and AI-enabled tools designed around the day-to-day needs of financial professionals.

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