



AI for Advisors **Cheat Sheet**

8 Ways Your RIA Can Use AI to
**Cut Meeting Admin Time by
90%** While Elevating Client and
Advisor Experience

Feeling anxious about integrating AI into your financial advisory practice? You're not alone. Many advisors worry about AI taking over their jobs, introducing compliance risk, or being too complex to use effectively.

But what if AI could streamline your workload, especially mundane administrative tasks that eat up your valuable time before and after client meetings?

In this guide to turning AI to your advantage, we'll show you 8 concrete ways AI can make your life easier, right now. Dive in to see how AI can work for you, not against you.

Spoiler alert: You're going to see some ways to piece together an AI toolset that will require quite a bit of handholding in the first 8 points. Make sure you read #9 – the bonus – for a single, seamless way to put your firm on AI autopilot right now ([Jump](#))!

#1. Transcribe a meeting

Without AI: You can use a human transcription service to transcribe your meeting to know exactly what was said, but these services are costly and slow. Typically, you'd expect to pay \$90 for a 60-minute meeting, with a turnaround time of about 12 hours. There are also subscription services that give ongoing access to overseas human transcription.

With AI: There are now several transcription services AI transcription services available, with several that are now well over [90% accurate](#).

How to do it with AI: You can Google "AI transcription" to find several services that will allow you to upload a recording and get your transcription back quickly. Make sure your compliance officer is on board with any transcription service you use!

How to do it with Jump: Use Jump tools to capture in person meetings, virtual meetings, or dictated voice memos and automatically get the recording and transcription as soon as the meeting is over.

#2. Generate a meeting summary

Without AI: You know your firm best, but on average, advisors tend to allocate 20 minutes or so to typing up a meeting summary note. That's valuable time – you might also have a human notetaker in the meeting, which adds another 60 minutes or so of wages to your list of expenses.

With AI: With AI, count on about one minute to process a long transcription and get a useful summary back. You'll want to make sure everything is accurate, so give yourself 4 minutes or so for review and approval.

How to do it with AI: Upload the entire transcript to [ChatGPT](#) (sign up for ChatGPT+ to be able to fit long transcripts), and include a prompt detailing what you want your summary to look like. For an example of what those prompts might look like, [check out this article](#). **Important note:** before uploading any type of sensitive data to an external service like ChatGPT, you'll want to make sure you've checked with your compliance officer and [disabled training](#).

How to do it with Jump: Jump automatically generates detailed meeting notes made for advisors, ready to review, edit, and sync to CRM with one click. Jump's AI Assistant is 100% customizable to imitate the format and style of your own notes.

Other notes: Though it's expensive to bring another person into a client meeting, it can be hard for advisors to be fully present with clients if they're also the one taking notes. Knowing you've got a recording and the ability to generate a meeting summary can help you focus on the client, and bring peace of mind that nothing's going to slip through the cracks.

#3. Prepare for meetings to enable continuous client experience

Without AI: Count on at least 20 minutes of preparation before a client meeting, depending on the type of client. You'll probably want to look through your CRM records, check out notes from the last meeting, review any communications, and check on any recently completed tasks.

With AI: AI can do this tedious searching for you and surface what's most important! Want to remember your client's dog's name, or that their daughter just got married? AI can bring that to you just in the nick of time. Count on 3 minutes of this type of prep — just reading what AI has surfaced.

How to do it with AI: Export all of your client data before each client meeting and use ChatGPT or a similar model to summarize the data into a useful brief.

How to do it with Jump: Right now, there's only one tool on the market to do this type of work automatically... Jump automatically prepares a pre-meeting brief based on your CRM data! (see Bonus way #9)

Other notes: If you're back-to-back with meetings, you might not even have time to do this type of client prep work, resulting in a client experience nobody wants.

#4. Check for meeting compliance

Without AI: The ever-looming SEC / FINRA audit of your meeting notes could be just around the corner, and you want to be prepared. Reviewing your transcript and notes to make sure that everything's buttoned up is an important step, and you should make sure that everything is exactly the way compliance wants it to be. Count on 10 minutes per meeting.

With AI: AI can take compliance into account when it writes the initial meeting note, and can even conduct an additional "compliance scan" for you, acting as a pair of compliance eyes on everything you do. For examples of an AI compliance scan prompt, check out [this article](#).

How to do it with Jump: Jump reminds you after each meeting to log the audit friendly note into your permanent CRM record. Busy day of back to back meetings make it hard to remember meeting details? With a recording, transcript, and AI generated summary notes, you can log quality meeting notes for multiple meetings in minutes.

Other notes: While time savings is great, knowing you're always prepared for the possibility of an audit is priceless.

#5. Ask anything about a meeting

Without AI: Trying to remember what a client said about a particular subject—maybe their updated thoughts on retirement, or which tech company they were most interested in? If you've got a recording or transcript, count on 10 minutes of searching to make sure you've got the data and all the context.

With AI: This doesn't take any time at all — just ask your question, and let AI respond based on the data from your meeting.

How to do it with AI: Copy and paste the transcript of your meeting into ChatGPT or a similar model and ask your questions.

How to do it with Jump Like a mini-ChatGPT set up to review your client meetings, ask any question about the meeting in Jump and get an answer immediately, no long prompts or transcript necessary.

#6. Extract specific data from a meeting

Without AI: Have a list of data points you need to add or update when you talk to a client? Maybe you go through a list of questions and type the answers into a form, or maybe, heaven forbid, you do it on paper! Count on 10 minutes of tedious data entry to get through this.

With AI: Data extraction can be part of a meeting prompt; you won't need any additional time to extract specific information!

How to do it with AI: Make sure you have a transcript of the meeting; upload it to ChatGPT (see cautions above) and prompt it for pieces of specific data. For an example, see [this article](#).

How to do it with Jump: Jump automatically extracts and organizes financial planning data, suitability/fiduciary related data, and your custom client onboarding data, ready within minutes of your call ending.

#7. Determine and assign tasks from a meeting

Without AI: Count on at least 10 minutes to create tasks in your CRM or task management software, assign them to the appropriate parties, make sure nothing was missed.

With AI: You'll probably only need two minutes to review auto-generated tasks and sync them to your CRM or task management system.

How to do it with AI: As above, you could upload an entire transcript to ChatGPT and ask it to pull out follow-up tasks from the meeting.

How to do it with Jump: Jump's AI Assistant listens for tasks and action items, turns them into smart editable task cards, and then allows you to sync them to CRM with one click. Coming soon... kick off workflows, Action Plans, and Cases from right within Jump to keep follow up work moving quickly and to prevent tasks from falling through the cracks.

#8. Dictate a meeting summary

Without AI: With a service like Copytalk mentioned above, you'll probably dictate a summary in about five minutes – but you might wait up to several days to get a transcript back.

With AI: You'll still need to spend the time dictating, but with AI, you'll get the transcript back immediately – and with the right tool, it's possible to get your dictation to become audit-ready notes and smart tasks within seconds.

How to do it with Jump: Dictate your voice memo into Jump and get formatted notes and tasks, ready to send to CRM.

The bottom line

So, how much difference can AI make for your bottom line? Let's do the math on your **time and money ROI**.

If you add the time up for each of these tasks for a typical meeting, you spend **70 minutes** between prep, note taking, data extraction, task creation and assignment, syncing to CRM, and coming back later to remember what happened in a meeting.

The equivalent work done, with AI, takes **10 minutes**.

If you have an average of **20 meetings per month** with an average of **60 minutes of time savings** per meeting, you will save **1200 minutes, or 20 hours, per month**.

If the cost of doing this work by hand averages at \$70/hour, that's a \$1400 cost of doing this without AI.

Jump, the AI assistant made exclusively for financial advisors, costs approximately **90% less than that**.



"This is already saving our team dozens of hours per month just in notetaking and CRM updating time."

Veronica Fox
Chief of Staff, Solidarity Wealth

#9 Try Jump!

Jump is an all-in-one AI Assistant for note taking, compliance, meeting prep, and CRM updates made just for financial advisors. It not only promises time and cost reduction but also helps your firm be more efficient, compliant, and client-focused.

The right AI tools frees you up to focus on what really matters — building stronger client relationships and providing strategic advice. With Jump, you put admin work on AI autopilot, cutting meeting admin time by 90% while elevating you and your clients' experience.

To learn how Jump can be easily integrated with your existing systems to slash meeting admin time, schedule a call with a member of the Jump team:

<https://jumpapp.com/demo>

