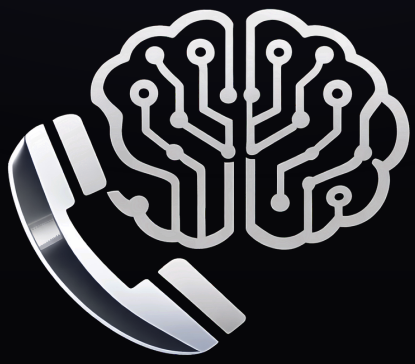


AI Investor Calls

HOW THE SERVICE WORKS, IN DETAIL

AI Investor Calls Service Guide

How your agent is built and approved, how calls run, how every result is filed, what it costs, and what you control. Written for teams deciding whether to sign up.

8.6M+	490+	800K+	47+
AI CALLS MADE AS OF JULY 2026	AGENT VERSIONS BUILT OCT 2026	AI-ANALYZED TRANSCRIPTS THROUGH AUG 1, 2026	OFFERINGS PITCHED OCT 2026

Companion to the Service Overview. Prices are from investorcalls.ai/pricing.
Screen and button names match the client portal as of October 2026.

JAD Enterprises LLC · 1402 S Custer Road, Suite 503, McKinney, TX 75072 · October 2026

WHAT YOU ARE SIGNING UP FOR

What the Service Includes

AI Investor Calls is the AI division of JAD Enterprises LLC, in the lead business since 2016 and building AI voice agents since 2023. It is a managed service. We build and run the agent. You decide who gets called and when.

Included with every account

- ✓ **A custom agent for your offering.** Pitch, knowledge base, objection handling and follow-up email, written from your materials and approved by you.
- ✓ **A dedicated phone number.** Your agent calls from it, and leads who call it back can reach your agent.
- ✓ **The client portal.** Upload lists, send runs, schedule calls, play recordings and export results.
- ✓ **A Google Sheet that fills itself.** Every call lands in the right tab as it ends.
- ✓ **Recordings, transcripts and summaries** for every call.
- ✓ **Testing, maintenance and support.** 30+ automated test scenarios before launch, then ongoing tuning.

Your list or ours

Upload your own CSV, XLS or XLSX file. Or order accredited investor leads from JAD, delivered as Excel or CSV and ready to upload. Orders start at $750.

One agent per offering

Each offering gets its own agent, built and billed separately. Up to 4 agents per client, each with its own phone number.

This guide goes deeper than the overview. It covers the call rules, retries, callbacks, billing steps and the portal screens by name.

BEFORE THE FIRST CALL

How Your Agent Is Built and Approved

Your agent is ready for your review within three to five business days of getting your materials. Nothing is dialed until you approve it.

What you send us

Your PPM, pitch deck, website and any FAQs or one-pagers. Your qualifying questions, such as accredited status, sector experience and your minimum. Your tone: formal or friendly, male or female voice, caller name.

What we write

The opening pitch, the call flow, the knowledge base the agent answers from, objection handling, and the follow-up email. You review each part and ask for changes until it is right.

The approval path

- ✓ **1. Questionnaire** at investorcalls.ai/questionnaire, then the $2,500 setup fee.
- ✓ **2. Draft review.** You approve the pitch, knowledge base and email.
- ✓ **3. Voice and persona.** Hear sample recordings, then pick voice, pacing and caller name.
- ✓ **4. Build and testing.** 30+ automated test scenarios against our quality checks.
- ✓ **5. Portal setup.** Pay the platform fee, get your login and the client guide.
- ✓ **6. Hear it yourself.** Use **Test My Agent** on the Dashboard. Enter your phone number and first name and your agent calls you. Five free test calls a day.

Changes after launch. Minor content updates are included. Major rebuilds are quoted separately. You can keep one voice and one caller number across all 8 runs.

INSIDE ONE CONVERSATION

How the Agent Handles a Call

The call, step by step

- ✓ **Opener.** “Hi [first name], this is [caller name] with [your company]. Do you have 30 seconds?” Busy prospects are offered a callback. Soft refusals get one gentle follow-up.
- ✓ **Pitch.** 80–140 words, under 45 seconds, ending on an open question.
- ✓ **Email.** The agent asks for the best address, with at most two tries to get it right. It never pushes if the prospect declines.
- ✓ **Questions.** One at a time: accredited status, sector experience, comfort with your minimum and timeframe, occupation and state.
- ✓ **Close.** The agent offers a short follow-up with your team, or ends politely.

What the agent never does

Go off your approved content. Make up an answer. It parks unknown questions for your team. Hard-sell. Ignore a “do not call” request. Talk to a voicemail. It ends those calls quietly.

Length and AI disclosure

A typical call runs 2 to 5 minutes, 6 at most. The agent handles interruptions and topic changes. If the person asks, the agent says it is an AI.

Qualify, don't filter. A prospect who says “not right now” is asked about timing and filed as Good For Later, not thrown away.

YOU DECIDE WHEN CALLS GO OUT

Sending Runs and Scheduling Calls

Upload a list on **Upload Leads**, then send it from the Dashboard. Calls only go out when you send them or schedule them.

- **Runs.** The **Send Calls** section has Run 1 to Run 8. Each button shows how many leads are ready now and how many are waiting to be called again.
- **How many per send.** Min 100, max 2,000 per run by default. We can raise your max to 5,000. Default daily limit: 10,000 calls. We can raise it.
- **The confirm box.** It shows the call count, the credit cost and your balance. Pick **Send all eligible leads**, or **Send leads by file** and tick up to 30 uploads. At 1,000+ calls you type SEND to confirm. Once sent, calls can't be stopped or pulled back.
- **Parallel calls.** The agent places up to 50 calls at once, with the same pitch on every call.
- **Cool-off.** After a send, the **Time Before Next Send** timer runs: 15 minutes per 200 leads, or 10 minutes per 200 on per-contact plans. The Run buttons turn back on by themselves.
- **Rejected leads are not lost.** If the phone system rejects some leads in a send, they stay ready for your next send and those credits go back to your balance.

Uploading a list

CSV, XLS or XLSX, any size. Headers are read from 170+ common variations, and you can name each upload. Optional lead cleaning, paid per upload, runs a disconnect check and a reverse phone check before calling.

Buy New Leads

When it is on for your account, the blue **Buy New Leads** button lets you order JAD leads in the portal. You pick sectors and states. Leads load into Run 1, and leads you already have are skipped.

Schedule Calls. Set one-time or weekly sends on the **Schedule Calls** page: up to 3 per day, 100 to 2,000 leads each, between 8:00 AM and 7:00 PM CST. You get a confirmation email. There is no other automatic sending.

WHEN LEADS ARE CALLED, AND CALLED AGAIN

Calling Windows, Retries and Filing Rules

Calling window

Calls go out inside 8:00 AM–7:00 PM CST. In **Call Settings** you can narrow it with Window Start and Window End. The window is applied in each lead's own time zone, so a California lead is called during California hours.

Retries

Recall Days (No Answer): 1–90, default 5. **Recall Days (Answered)**: 1–180, default 30. A lead moves through the runs. After Run 8, a lead not reached is not called again.

WHAT HAPPENED ON THE CALL	WHAT THE SYSTEM DOES
Voicemail picks up	Ends quietly, tries again later
Phone directory or menu system	Filed as Bad Leads, not re-dialed
Call screen (“say your name”)	Re-dialed later
Clear “not interested” (8 seconds or more)	Filed as Not Interested
Says their name, then goes silent	Re-dialed later
“Do not call” request	Call ends, never called again

Closed means closed. A lead closed on a callback, as not interested or do not call, is never reopened by a late result from an earlier call.

WHEN A LEAD CALLS YOU BACK

Callbacks and Inbound Calls

Many prospects call back the number that called them. With inbound turned on, they reach your own agent instead of a dead line.

How inbound works

- **Turn it on** in the **Receive Inbound Calls** card on the Dashboard: **Confirm Inbound Calling**, then **I Understand — Enable Inbound**.
- **Only dialed numbers get through.** Your number answers only leads we have called. Unknown callers are dropped.
- **Results file the same way.** A callback lands in your portal and Sheet with its recording, like any other call.
- **Hidden numbers.** A call from a blocked number leaves a result row with a blank phone. It is not billed.

What a callback costs

Callbacks are free on per-call plans. On per-contact plans, a qualifying callback uses 1 contact credit. A callback qualifies when it lasts 20+ seconds and comes within 72 hours of our call.

The demo line

Prospects testing the service at investorcalls.ai/demo-call get the same callback idea. If the demo call doesn't connect, they get one email with a number to call. After confirming their email, they can call each of the 3 demo agents once within 7 days, from the phone they entered.

WHERE EVERY CALL ENDS UP

How Results Are Tagged and Delivered

TAG	SHEET TAB	WHAT IT MEANS
Good Leads	Good Leads	Interested, ready for follow-up
Good For Later	Good Leads For Later	Interested, gave a later time
Not Interested	Not Interested Leads	Reached and declined
Bad Leads	Bad Leads	Wrong number, disconnected, directory, do not call
Non Accredited	Non Accredited	Said they are not accredited
Dead Leads	Dead Leads	Could not be reached

On every row

Name, phone, address, state and the email they gave. Accredited status as the investor told the agent. Interest level, sector experience, occupation and callback time. A summary, recording link, call length and quality score. New Sheets also have a **Source List** column showing which upload the lead came from.

In the portal

The **Results Overview** cards count each tag and open its results page. Results pages show date, name, phone, classification, quality, duration, summary and recording, with **Export Excel**. **Export Good Leads** and **Export All Calls** email you a download link that lasts 7 days.

Follow-up email. Interested contacts can get your approved introductory email right away, sent from your company address through your Google Sheet.

WHAT IT COSTS

Setup, Platform Fee and Call Credits

Agent creation: $2,500 one time

Per investment offering. Custom pitch, call flow, objection handling, knowledge base from your materials and post-call analysis.

Platform fee: $500/month

Portal, agent, dedicated phone number, recording, result classification, real-time Sheet sync and maintenance. First-time bonus: 2,500 free call credits.

PACKAGE	PER CALL $0.15 PER CALL ATTEMPT	PER CONTACT $3.50 PER CONVERSATION
Starter	2,500 calls · $375 · $0.15	150 contacts · $525 · $3.50
Standard	5,000 calls · $750 · $0.15	300 contacts · $1,050 · $3.50
Professional	10,000 calls · $1,400 · $0.14	600 contacts · $2,040 · $3.40
Enterprise	20,000 calls · $2,700 · $0.135	1,200 contacts · $3,960 · $3.30
Volume	30,000 calls · $3,900 · $0.13	2,400 contacts · $7,680 · $3.20

- **Per call:** charged for every call placed. Best for large lists where you want predictable costs. Callbacks are free.
- **Per contact:** charged only when a real person is reached (30+ seconds). A qualifying callback uses 1 contact credit.
- **Included:** testing, follow-up email automation, recordings, transcripts, ongoing agent optimization and technical support.

HOW BUYING WORKS

Credits, Discounts and the Platform Fee

Credit packs are never bought automatically. On per-contact plans, your saved card can be charged for overages.

The purchase steps

- ✓ **Buy Credits** in the header. Pick a pack, or the Platform Fee.
- ✓ **Confirm Purchase.** You see the list price, any account discount and what you pay. Enter a code in **Have a promo code?** and press Apply.
- ✓ **Verify Identity.** Re-enter your password.
- ✓ **Card payment** through Stripe. Card details are not stored on our servers. The Service Agreement is signed once, at your first purchase.

Discounts and codes

You get the better of your account discount or a promo code, never both. You always receive the full credits for the pack. Lead Data Cleaning and Buy New Leads are never discounted.

Platform fee days left

The usage card shows **Platform Fee — paid through** a date, with days left. Renewing early adds 30 days to the days you have left. If the fee lapses, new calls pause. Your leads and call results stay in the portal while your account is active. After 180 days with no activity, we may delete them.

Credits. Credits are not refundable. Credits never expire, but you need an active monthly platform fee to use them. The usage card also shows Monthly Usage and Today. At 80% of your monthly limit you can use **Request Higher Limit**.

CLEAR LINES

What You Control and What We Control

You control

The pitch and knowledge base you approve. Which lists you upload and name. Deleting pending leads by run or by file. When runs go out and how many. Schedules. Your calling window and recall days, inside the limits. Whether inbound is on. Every purchase. Your follow-up email and the address it comes from. What your team does with each lead.

We control

Building, testing and maintaining the agent. The call flow and the filing rules. The outer calling window: 8:00 AM–7:00 PM CST. Per-run and daily limits. Removing “do not call” numbers for good. Keeping recordings, transcripts and summaries for every call. The phone number and the platform.

How your data is handled

- ✓ **Kept separate.** No other client can see your leads, results or account.
- ✓ **Recorded.** Every call has a recording, transcript and AI summary.
- ✓ **Opt-outs honored.** Phrases like “remove me” or “stop calling” end the call and the number is never called again.
- ✓ **Accredited means self-reported.** Accredited status is what the investor told the agent. We don’t check their net worth or income. Your team decides what checks to run before an investment.

Legal. We don’t give legal advice. Your company decides how its outreach meets the rules, with your own counsel.

QUESTIONS BUYERS ASK

FAQ and Next Steps

- ? **Can calls go out on their own?** Only on a schedule you set in Schedule Calls. Otherwise you send each run.
- ? **Can I stop a send?** No. Once sent, calls can't be stopped, which is why the confirm box shows the count and cost first.
- ? **Can a stranger reach my agent?** No. Only leads we dialed are answered.
- ? **Do callbacks cost extra?** Free on per-call plans. 1 contact credit per qualifying callback on per-contact plans.
- ? **Which upload did a lead come from?** See the Source List column in your Sheet.
- ? **Does "accredited" on a JAD lead mean checked?** No. Accredited status is what the investor told our callers. Our replacement policy covers disconnected, wrong person, not accredited, deceased and duplicate leads.

- ✓ **1. Call our live demo agent:** investorcalls.ai/demo-call. Your phone rings within seconds.
- ✓ **2. Tell us about your offering:** investorcalls.ai/questionnaire.
- ✓ **3. We build your agent,** you approve the pitch, then we launch.

Questions? Call (214) 304-2168 or email info@jadenterprises.org
Mon–Fri 9 AM–5 PM CT · Book a call: meetings-na2.hubspot.com/jad-enterprises/jad-enterprises-meeting

investorcalls.ai

AI Investor Calls is the AI division of JAD Enterprises LLC, in the lead business since 2016. 1402 S Custer Road, Suite 503, McKinney, TX 75072, just north of Dallas. We don't provide capital. We provide investors. © 2026 JAD Enterprises LLC.