

The AI Platform Built for Financial Advisors



Amplifying Advisors. Automating Admin.

Zocks is a privacy-first AI platform, not just another notetaking app. It transforms every client conversation into structured, actionable intelligence—no recordings, no compliance headaches. Purpose-built for financial advisors, Zocks handles meeting prep, captures real-time notes from in-person, phone, and virtual meetings, generates personalized follow-ups, and syncs to your CRM—so you can focus on the conversation, not the notepad.



MEETING PREP

Zocks handles the pre-meeting heavy lifting. From custom agendas and conversational prompts to client summaries and drafting pre-meeting emails, everything's ready with a click of a button.



LIVE NOTE CAPTURE

In-person, phone, or virtual, Zocks captures every key meeting detail in real-time—without ever recording a word. You get accurate, structured meeting summaries that reflect the personal and financial facts and goals from every conversation.



ACTION ITEMS & FOLLOW-UPS

No more chasing tasks or struggling with follow-up emails. Zocks instantly generates personalized follow-ups emails, assigns action items, and even auto-fills forms so nothing slips through the cracks.



EMAIL RESPONSE

Zocks generates intelligent, context-aware replies to client emails by pulling in details from past meetings, CRM, and communications, so you can respond in seconds with confidence and consistency.



CLIENT INTELLIGENCE AT SCALE

Zocks doesn't just take notes—it connects the dots. Insights, life events, and opportunities are automatically surfaced and synced to your CRM, helping you spot patterns across households and conversations.



PRIVACY & COMPLIANCE

Engineered for privacy and regulatory peace of mind. No recordings. No third-party data training. Just control, transparency, and peace of mind.



What Zockstars Say

"At Hill Investment Group, we pride ourselves on leveraging technology to stay ahead of the competition. Zocks has been a game-changer for us! Its advanced AI note-taking capabilities streamline work, enhance decision-making, and provide us with deep insights that were previously unattainable."

Matt Hall

CEO, Hill Investment Group



"We had been looking for a long time for a technology solution that could improve our efficiency and give us more time to focus on our clients' needs. With Zocks, we can do both. The technology efficiently captures the content of our meetings and summarizes our conversations automatically. The time savings allow us to dive more deeply into our clients' issues and spend more time on analysis and problem-solving. It's hard to imagine our business today without Zocks."

Frank Napolitano

CFA, CFP®, Sensible Financial



Get Set Up in Minutes. Start Saving Hours.

Build unshakeable client relationships by being fully engaged in every client conversation.

Free 30-day trial! Visit zocks.io or scan to learn more:

