

Zocks.

SEI Strategic Partner



Leverage our relationships to get discounted pricing on valuable services.

As part of our continued commitment to help advisors power wealth and focus on client relationships, we have established strategic partnerships with several key business service partners to help you **reduce costs, save time and increase efficiencies** to run a more successful firm.

Zocks

Zocks is a privacy-first, agentic AI Platform for financial advisors and financial firms. Its AI assistant saves advisors time by automating manual tasks and turning every client conversation, email, and document into structured data that's deeply integrated with a firm's technology stack and AI ecosystem. Advisors can build plans and onboard clients faster, find growth opportunities, anticipate servicing needs, and ultimately grow their business — all in a platform built with enterprise-grade compliance, reporting, and controls.

Contact

sales@zocks.io

Discount

Zocks Essentials - 10% discount off the annual subscription price per advisor for new subscribers; Code: SEI10

Zocks Professional - 15% discount off the annual subscription price per advisor for new subscribers; Code: SEI15

Zocks Ultimate - 15% discount off the annual subscription price per advisor for new subscribers; Code: SEI15

Website

<http://www.zocks.io>

Important information

SEI is not affiliated with any firms mentioned herein. SEI Global Services, Inc. has contracted with listed vendors to provide these services to select Independent Advisor Solutions by SEI clients. SEI does not endorse the use of any of the products mentioned herein. Always check with your firm's compliance department before implementing any new technology solutions.