Jerry Cooper ([00:02](#)):

Great. So let me begin by telling you, I think you're at the stage right now where you're interested in working out a trajectory with one click trade. I got to get, well of course I know who you are. The new gentleman that just came on as business development. I need your name, I forgot it.

Harold Janecek ([00:27](#)):

Harold Jan. The last name J-A-M-E-C-E-K-J-A-M-N as in Nicholas, Edward. Charlie, Edward Kilo.

Jerry Cooper ([00:42](#)):

You know I'm never good at phonetic spelling. Just spell it with the JAN part.

Harold Janecek ([00:50](#)):

So JAN as in Nicholas, E as in Edward, C as in Charlie. Got

Jerry Cooper ([00:58](#)):

It.

Harold Janecek ([00:59](#)):

E as in Edward, K as in kilo.

Jerry Cooper ([01:03](#)):

Got it. Gen check, is that right? Gen check.

Harold Janecek ([01:06](#)):

Yeah, that's actually the correct pronunciation. We have a Chicago, so we just say,

Jerry Cooper ([01:12](#)):

Alright. And your B biz development. Okay.

Harold Janecek ([01:16](#)):

Yes.

Jerry Cooper ([01:19](#)):

It's a couple things. I'm just curious, will, how many team members do you have at all Tactical,

Wil Raj ([01:28](#)):

Including all the remote people? I want to say 12 now. 12 people. Oh

Jerry Cooper ([01:32](#)):

Wow. 12 heads. All right. So what we want to do is help you create a machine that would make it possible that any advisor who has any kind of interest in your category of investment as an ETF would wind up on our AI site and wind buying some or a lot of your ETF. So Brandon, who is our CTO, did a great job of putting a demo together using one click trade and ai, which has never been done before. Of

course, that would allow us to be able to educate an advisor to have them understand what's involved in working with an ETF like yours. Just in a nutshell, will give me just an elevator pitch on Hall's single ticker. What was the ticker symbol? Will?

Wil Raj (02:39):

Yeah, ticker is HT S, and it's a large cap replacement for the s and p. So we forecast the next day's excess equity, equity risk premium based on 30 different indicators that go into quantitative model. And then if that forecast is bullish, we'll be overinvested, or if it's neutral or bearish, we'll be underinvested. The main premise is to outperform the s and p with less volatility.

Jerry Cooper (03:12):

Got it. How do you differ from spy?

Wil Raj (03:15):

Well, S spies just a passive fund with a benchmark with HDS, it's actively managed. We just released an academic paper based on these indicators that we think in the long term. Using all these predictors combined into a model, we think we can deliver alpha for clients above and beyond just simply buying spy.

Jerry Cooper (03:39):

Got it. So when you say model, what do you mean? Is it like a model meaning buying your ETF with other ETFs or Explain that,

Wil Raj (03:50):

Yeah, when I say model, I mean the quantitative model that drives the investment decisions for the fund. It's a one day elastic net machine learning model.

Jerry Cooper (04:01):

Got it. But it has nothing to do with model portfolio?

Wil Raj (04:06):

No.

Jerry Cooper (04:06):

Okay. Alright. Good. Alright, so I'm going to share my screen and oh, I need Brandon to do that because Brandon's going to explain what we've done with your data. What we're hoping to do, if you sign onto our program of having us create e-blasts for you, that's a synergy to go with your HTUS ticker and make it so that an advisor is enthralled, they're hypnotized to want to buy you. They want everything that you have just talked about are going to be, is going to be important to advisors. So Brandon, go ahead and explain the database that we've created. We've created a model, just a temporary model right now for your ticker with the data that we've collected from your website and some other things. Brandon will talk to you a little bit about that. Go ahead.

Brandon Hellman (05:09):

Yep. Yeah, we take your prospectus and pretty much all of the documents that you had available on your website in PDF form and we uploaded that for the context for the AI model to and for knowledge and stuff from along with everything from the internet and current TICKETER prices and stuff like that. And that'll allow advisors or STIs to go ahead and ask the AI chat bot and kind bounce ideas off, see which tickers like AC US is good for which kind of their clients or high net worth clients or whatever like that. And on top of that, after we have that general data, we also have our team do fine tuning meeting and stuff like that to be sure we're getting all the actual proper responses and stuff from that chat bot.

Jerry Cooper ([05:58](#)):
Boy, that's a mouthful. One thing good about Brandon is that nobody can understand and except Scott and I, we serve as a great filter for all that. Anyway, go ahead and show the database of the elements that we put into it. You need me to do it? I can do it.

Brandon Hellman ([06:21](#)):
Nope. You should be sharing.

Jerry Cooper ([06:26](#)):
There you go. Just give me that on full screen. What's on

Brandon Hellman ([06:30](#)):
There? Hold on, I got to pick the,

Jerry Cooper ([06:37](#)):
There you go. Alright,

Brandon Hellman ([06:38](#)):
There we go.

Jerry Cooper ([06:39](#)):
Alright, so this is what we call our model builder. We've used the smartest AI that's in existence. It's Claude, the sign at 3.7 if you're following AI or happened to be, this is the one that makes everything work great. But anyway, explain on the right area as project knowledge. These are the things that we loaded in, just so that the AI gets its brains. So start with the one on the left top corner.

Brandon Hellman ([07:09](#)):
This is the whole tactical US PDF. This is I believe from our vault advisor material and yeah, so I was just upload the PDFs here. We have another one as well. This is the reprint.

Jerry Cooper ([07:29](#)):
Yeah, if you recall a while back, we did a story q and a that Scott did with Petro. Yeah, this is it. So

Brandon Hellman ([07:37](#)):
We want back in September, October.

Jerry Cooper ([07:41](#)):

Okay. What else you got

Brandon Hellman ([07:43](#)):

Then these, I believe are your guys' documents, navigate market volatility. This one, this looks like it's more kind of just formatted for the computer. This is,

Jerry Cooper ([08:09](#)):

Yeah, what I think that, let me take over from here.

Wil Raj ([08:14](#)):

So I all these guys, right?

Jerry Cooper ([08:16](#)):

Yeah. So we've loaded all of this. Everything that you see here will should be in our AI right now and we can call from it. I'm sure you have no quarrel with having us look at your website and use the data to help come up with a conversation. Is that okay? Will?

Wil Raj ([08:34](#)):

Yeah, yeah, of course.

Jerry Cooper ([08:36](#)):

I like that. Alright, so Brandon, I need you to turn your share off so I can do it.

Brandon Hellman ([08:42](#)):

Stop share. Alright, you're good to go.

Jerry Cooper ([08:44](#)):

Thank you. Alright, so moving backwards.

Harold Janecek ([08:54](#)):

This one closed

Jerry Cooper ([09:02](#)):

Here. This was the first one. So I think that I saw two or three different emails that we sent. This was one of 'em. I don't know the timeframe. It's hard to tell, but, oh yeah. Well, I don't know. This has got June of, I can't be right. June has it happened?

Wil Raj ([09:25](#)):

I think that was last year in September.

Jerry Cooper ([09:27](#)):

That was last year. It's old, right?

Wil Raj ([09:29](#)):

Yeah.

Jerry Cooper ([09:30](#)):

Okay, got it. I'm just curious because the story we reported showed an expense ratio of 1% and this is 0.96. Can you explain the variation?

Wil Raj ([09:42](#)):

Yeah, the expense ratio here is as we of the management fee plus any fees for running the fund. But then that 1% also includes the fees that we pay for simply holding spy.

Jerry Cooper ([10:01](#)):

So is the load 1.96 or one? What is it? I'm just a little curious.

Wil Raj ([10:08](#)):

The true expense ratio is 1%.

Jerry Cooper ([10:11](#)):

Oh, got it. All right. Well, we're going to ask AI the question, see what it comes up. This was a chart that was up in your, was this your first email that you did with us?

Wil Raj ([10:24](#)):

Yeah, that was our first email That was, we don't really have any marketing backgrounds, so that was our first email that we used your input on and developed this chart and email. It was still too many words I think, but we were much more happy with the second one we sent,

Jerry Cooper ([10:43](#)):

Which is the one that I popped up on. But I just want to go through it. I'm going to play the role of the AI to try and understand what you guys did here. One thing that whenever you put something and underlines that the reader infers that this is a clickable URL

([11:05](#)):

And Brandon and I struggled yesterday trying to figure out whether there was a mistake in our programming or whether this was intended to be a URL that never got put in there, but we figured out this was just actually Mark helped us, mark explained that this was just core equity replacement as a boldface underlined comment just for future use. Your advisors will waste a lot of time clicking this and it's not going to take 'em anywhere. But if you do want to expand on that, that probably would be a good idea. Alright. The other one that you would like better, which was

Harold Janecek ([11:53](#)):

Yesterday,

Jerry Cooper ([12:03](#)):

I get too many emails, so I can't get to the one that I want there. It's, it's way too far back.

Harold Janecek ([12:18](#)):

It's March. Grab the one

Jerry Cooper ([12:25](#)):

There. Okay, so this is the bad one. No, that's the good one. So I got it right. Alright, so we've asked AI to interpret this, and I'm going to go ahead and show you how it does it, but just in plain, simple language, explain this to me for infographics, what does this mean?

Wil Raj ([12:55](#)):

So we collect data daily, those get put into models. Those models spit out a market sentiment score, and then based on that score, the fund is positioned to help navigate market volatility.

Jerry Cooper ([13:12](#)):

Got it. So it's a score that you have proprietary, presumably that helps you navigate sentiment in the market. Is that right?

Wil Raj ([13:22](#)):

The score is not proprietary, it's just our expectations on what the market's going to do tomorrow.

Jerry Cooper ([13:31](#)):

Do other people use it other than you guys?

Wil Raj ([13:34](#)):

No. No. No one else uses it, but it is publicly available and updated on our website each day.

Jerry Cooper ([13:41](#)):

Wow. So in other words, you're giving that for freight of the world, but it has quite a bit of value. Scott, wouldn't that be the case? Wouldn't this be a

Scott Martin ([13:52](#)):

Oh yeah, yeah, definitely. But that's the power of ETF lens. If they were SA, they could hide a lot more.

Jerry Cooper ([14:00](#)):

Yeah. Alright, well that's great. Got it. And then position portfolio, tell me about that.

Wil Raj ([14:08](#)):

So based on that score, if it's bullish, the portfolio will be positioned leveraged long.

Harold Janecek ([14:17](#)):

If

Wil Raj ([14:17](#)):

It's bear, you'll be under invested for the next day.

Jerry Cooper ([14:22](#)):

Got it. Alright. Sounds like great strategy. These are the two emails. What we want to do is help you create the next one that will ultimately wind up in having the financial advisor or self-directed investor by HTUS. I think that's what you'd like to have happen, right? Yeah.

([14:48](#)):

Okay. Well, we're going to make that happen. I'll show you the mechanics. So let me grab the other part and minimize it because I might be back and let's go to, Claude needs to go here. Yay. All right. So just to understand the power of Claude, we're using this as a sandbox to create the model that we need in order to make the conversation work for you so that you are educating your financial advisors and your investors as to what HTUS is all about. Okay? This was a graphic that was from the email that you didn't like, but let's look at how Claude interpreted this. So I asked Claude to interpret this. Does this look like a good interpretation? I may not need to rig this or anything. It just read it had eyeballs, it read the picture and it came up with this. Does this seem right?

Wil Raj ([16:07](#)):

It

Jerry Cooper ([16:11](#)):

As of that picture things that might have changed, but I just want to understand that you would agree that that's just a visual interpretation of what that graph

Wil Raj ([16:22](#)):

Yeah, it's mostly right except the, it's up to 200% invested during favorable forecast, not up to a hundred.

Jerry Cooper ([16:30](#)):

Yeah, but we're just using this one graphic. Is it?

Wil Raj ([16:33](#)):

Sure.

([16:34](#)):

Yeah.

Jerry Cooper ([16:35](#)):

I realize that your head is way ahead of this, but we just want to validate the concept.

Wil Raj ([16:44](#)):

Yeah.

Jerry Cooper ([16:45](#)):

Okay. Alright. Okay. Brandon, have I got the database loadable on here?

Brandon Hellman ([16:53](#)):

I'm not sure if you're using the project or just a one-off chat.

Jerry Cooper (16:59):
I think this is a one-off chat. Will I be able to demo this based on this one-off chat?

Brandon Hellman (17:05):
Yeah, the buttons and everything will work still here.

Jerry Cooper (17:09):
Okay.

Brandon Hellman (17:10):
Want, if you want the PDF stuff, go start a new chat under the project.

Jerry Cooper (17:17):
I see it here. I got will this one work?

Brandon Hellman (17:19):
Yeah.

Jerry Cooper (17:20):
Okay, got it. Understood. So the magic is in this power. Here we go.

Wil Raj (17:33):
New.

Jerry Cooper (17:33):
No, didn't have that. How do we have the links?

Brandon Hellman (17:38):
You got to put it in the URL bar. You put it in the cloud chat by accident. So

Jerry Cooper (17:49):
No, sorry.

Brandon Hellman (17:51):
Yep. Just open a new tab and put the URL in

Harold Janecek (17:58):
Which tap

Brandon Hellman (17:59):
On the left click projects on the left side of your screen under new chat?

Harold Janecek ([18:04](#)):

Yeah,

Brandon Hellman ([18:05](#)):

Up higher. Ran that right under that projects.

Jerry Cooper ([18:11](#)):

Oh, project. Right.

Brandon Hellman ([18:15](#)):

Go to your team. I made it and then right there.

Jerry Cooper ([18:21](#)):

Beautiful. Okay, so now the database is here. Everything you guys saw in the earlier conversation that Brandon had is here. Is that right?

Harold Janecek ([18:33](#)):

Yep.

Jerry Cooper ([18:33](#)):

Okay. And when we hit a hundred percent of knowledge, capacity, we've got enough data in there to blow your minds, so to speak. Alright, so let's figure out, we're going to be a financial advisor and we're going to ask a question first is, what is

Harold Janecek ([18:58](#)):

Simplest question?

Jerry Cooper ([19:12](#)):

And just understand that what we do is the engineering or the model that's created by this, we create a permanent one of it. It's much faster than this because we are now using the public one and it will go much faster once we create our own AI for you. All right, I turned the voice off. It's so boring. I don't want to hear that, but I just want you guys to read what you could read it billion times faster than just they can speak. Does that look right for an

Wil Raj ([19:52](#)):

Elevator? Those key features, bullet points look correct?

Jerry Cooper ([19:57](#)):

Yeah. Okay. Well it did. Its, and this is a pretty nice terms here. Micro alphas. I love that. Alright, so you notice that there's some blue underlining in here, right?

Wil Raj ([20:13](#)):

Yes.

Jerry Cooper ([20:14](#)):

So the one click integration is part of what we do. So in other words, we're now going to Schwab as our demo example, and we're going to go by HTUS. It's one share, but depending upon where the email takes them will be how much we're recommending. And that will be part of that conversation that we had here. In other words, in the one that you liked here, will and Harold, is that we need this conversation to tell them how much we want to buy. We want them to buy. Okay? Now, that may not be true for everybody because everybody has an allocation, but because you're only a one ticker ETF company, you might want to buy more than one. But in your case, let's just say we're $25,000 via a fair amount. Does that make sense?

Wil Raj ([21:17](#)):

Yeah.

Jerry Cooper ([21:18](#)):

Okay. Lemme go back to that. Like, all right, so looks like it's 35 96. Okay, $25,000. I'm using a calculator, by the way. So it looks about 700 shares. Is that right? And if every advisor that went through this maze bought 700 shares, you'd be happy, right? Would that be good?

Wil Raj ([21:50](#)):

Oh yeah. Tremendously.

Jerry Cooper ([21:52](#)):

Well, we could do it. First of all, Scott, based on your experience of watching this, is this doable? Yes or no?

Scott Martin ([21:59](#)):

Yeah. Yeah. This is totally doable. You almost had me there for a moment, but then I realized the light bulb went off and this kind of recommendation, they're going to love

Jerry Cooper ([22:10](#)):

25 1, 72, but I'm pretty sure that most of the people that read your next email that connects to this will push the button and by the ETF. But let's assume they still have questions. Very important. Let's see how we can overcome those questions. Everybody has questions? Alright, back to the prompt. And I noticed you guys have one of those chat bots on your website. Actually, I saw two. One was named Petra and the other one was named somebody else. Yeah. Was that you, Harold?

Harold Janecek ([22:53](#)):

No, that was our firm founder. Yeah.

Jerry Cooper ([22:57](#)):

Oh, all right. I know Petra's in there. I thought Petra was the firm founder.

Wil Raj ([23:03](#)):

No, she's the CEO, but she's been here for forever.

Jerry Cooper ([23:06](#)):

Okay, all. So now, Mr. Martin, let's say you are a very inquisitive financial advisor. What question would be important for you to know? Hey, look. Point nine six. We love that. Yeah.

Scott Martin ([23:26](#)):

The first thing I always want to know is how can I fit this fund into my client portfolios?

Jerry Cooper ([23:33](#)):

You good with the question? Will?

Wil Raj ([23:35](#)):

Yep.

Jerry Cooper ([23:36](#)):

Okay. How can I fit this ETF into my client portfolio? I think you said portfolios.

Scott Martin ([23:52](#)):

Yeah. Let's see. It should know. Of

Jerry Cooper ([23:54](#)):

Course it's going to know.

Harold Janecek ([23:58](#)):

Nice.

Jerry Cooper ([24:08](#)):

Well, this thing is so smart. There isn't a question that you couldn't ask that it wouldn't have an answer that would be able to get them to pay to buy 700 shares. They couldn't. But I'm going to challenge you or Harold, come on. Give me a question. Toughy.

Harold Janecek ([24:32](#)):

Should I buy it in the volatile market?

Jerry Cooper ([24:36](#)):

Who is that? That was Harold or Will?

Harold Janecek ([24:39](#)):

Yeah, Harold.

Wil Raj ([24:40](#)):

Harold.

Jerry Cooper ([24:41](#)):

Okay. I love it. Should I buy in a volatile market?

Wil Raj ([24:47](#)):
No.

Jerry Cooper ([24:51](#)):
Did I get that right?

Wil Raj ([24:53](#)):
Yep.

Jerry Cooper ([24:54](#)):
No. Is it a or the,

Wil Raj ([24:57](#)):
You're right, it looks good. The volatile market looks good.

Jerry Cooper ([25:15](#)):
Looks good.

Wil Raj ([25:17](#)):
Yeah.

Jerry Cooper ([25:19](#)):
Remember, everything that you guys have out there is in here. So if somebody were to ask a reasonably intelligent question, the answer would come up here. And that is so important to you folks, because you don't want them going up upstream, downstream, or whatever we want them to buy. So that's

Scott Martin ([25:40](#)):
Really cool. Jerry, I haven't seen this question, but the answer's amazing.

Jerry Cooper ([25:46](#)):
Okay, so let's say here, I'm going to pick one. Let's assume I have a brain. What would I need to sell in my diversified portfolio to have HTUS fit into it? Fair question, right?

Harold Janecek ([26:13](#)):
Yeah.

Jerry Cooper ([26:28](#)):
So you ditch your spy and buy HDUS. Wow, we like that. I can tell you, Anna's not going to be happy with this. You guys know who Anna is? Scott, who's Anna? Who's Anna?

Scott Martin ([26:47](#)):

Anna. Anna is the business development head at State Street.

Jerry Cooper ([26:52](#)):
That's Bob. Oh yeah.

Scott Martin ([26:54](#)):
She's really, really interested in this product. So watching it disrespect her is kind of funny.

Jerry Cooper ([27:02](#)):
Yeah, that's perfect. Disrespect to her is kind of fun. Well, David and Goliath, right? Oh yeah,

Harold Janecek ([27:12](#)):
Yeah.

Jerry Cooper ([27:20](#)):
Alright. What to keep intact is not designed to replace bonds. International exposure. Now keep in mind, this is considered to be the model builder. Excuse me that yeah, the model builder. I'm stuck with that term model builder. You guys have got a different term for model builder. So do we. Alright, but anyway, let's do this. The Claude is so smart, he's going to do a little of your marketing strategy for you. If we were talking to a ETF investor who is a financial advisor, what messaging would we need to tell them so that they would buy 700 shares of HTUS?

Harold Janecek ([28:24](#)):
Good question.

Jerry Cooper ([28:40](#)):
First you noticed that the dictation was incorrect, but it knew what I was talking about.

Wil Raj ([28:48](#)):
Yeah,

Jerry Cooper ([28:49](#)):
Which is important. Okay. Core value proposition. Okay, so this should be on good fuel for your next email. If the AI thinks that this is good, but we have to set up a background, right?

Wil Raj ([29:08](#)):
Yeah.

Jerry Cooper ([29:08](#)):
Does this make sense to you? Will?

Wil Raj ([29:10](#)):
Yeah. Good.

Jerry Cooper ([29:14](#)):

Alright. What we wanted to do, and the reason that it's taken us so long to bridge one click trade with an ETF company, we are bridging it to spy and to others and it's working great, but what we want to do and now is make this work for you. What we'd like to do is create the next for you that does all of this, but special privileges are involved, meaning that we would need you to buy from us a few more emails, let's say three or four, that would make it worth our while to create a write a model for you that you use very durable over and over again to make the language work. And if it didn't work, it was on us. In other words, we would make certain that this thing was so smart that every time it played out, considering we hold the audience and I saw the audience, it's enormous that they buy 700 shares. How's that? And the cost of that. Chris isn't here, but he told me last night that he gave you a deal. I think it was $750, lucky guys, $7,500. Is that right?

Wil Raj ([30:45](#)):

I don't recall the specifics, but that sounds about right. Yeah.

Jerry Cooper ([30:50](#)):

Alright, so let's figure three of them. 22 5. That's okay. So if you would buy three emails from us on a commitment, we'll do all of this for you as part of the package. In other words, we'll go ahead and train the model. Brandon, can you do it? Can you train the model? This is something that easy would do. Easy is our guy. There's another layer below Brandon that does these. So he's our engineer. So that's what we would want to do for you. We would be able to take all the values, and I would like to make certain that whatever we do in terms of knowing that, let's ask this question. You were concerned about this one, this one here. Why didn't you like it? Well, why didn't you like it?

Wil Raj ([31:58](#)):

It's just too much. Too many words and it's not easily digestible as the other one we sent.

Scott Martin ([32:06](#)):

Okay, A year ago. Too many words was the right way to do it. Now everything's changed.

Jerry Cooper ([32:13](#)):

Okay, so let me ask clause of questions and remember that this part is programmable. So in other words, what we would do is we would customize this so that what we call the eyebrow or the ticker message would say, we recommend buying 700 shares for your portfolio. Please ask any question if you think differently. So in other words, it's a lift concept, meaning that we would overcome any objections in the conversational process by putting a message here and that,

Wil Raj ([33:07](#)):

Yeah. So if you guys were to create the emails, I'm sure it wouldn't be subject to distributor approval. But if we create the emails for you guys to send out, then it would be, and I don't think we can explicitly tell anyone to buy a,

Jerry Cooper ([33:26](#)):

We we're saying we're recommending, suggesting, I don't know, you're more of an expert on ETF compliance than I could ever be. So something that would move the investor from this to actually getting a recommendation

Wil Raj (33:47):

So long as there's a call to action. And then there's that one third trade whereby we can see this email generated so much advisor or shared demand actually track how much people actually bought from the email. That'd be great.

Jerry Cooper (34:04):

No, no, I understand that. What I'm trying to understand is what would the Lyft message be in words? What would you want to tell the advisor or a self-directed investor at this point? Hey man, this is a great ETF

Wil Raj (34:21):

Buy.

Jerry Cooper (34:22):

What would you want to say?

Wil Raj (34:24):

I'd say maybe replace a small portion of your large cap allocation in your client portfolio with H two US.

Jerry Cooper (34:34):

Okay. Scott, what do you think

Scott Martin (34:37):

It should be? Yeah, yeah. And also Jerry, I think everybody's AUM is going to be different. So 700 shares might be nothing to some and a real lift or other, we can just simply put that or put whatever number we need to in the pre-programmed trading screen. So that's sort of the starting recommended daily allowance. They can move up or down from there.

Jerry Cooper (34:59):

So is this sort of like Amazon saying you can only buy one? I had that problem two days ago. I wanted to buy more than one HT ML cord. It wouldn't let me do it.

Scott Martin (35:10):

Yeah, if your buying capacity is too small for 700, it is going to kick you out anyway. But at least this way they're at that final screen. They can change the number as they like. We didn't recommend the number and push it through.

Jerry Cooper (35:27):

Okay. So you're saying that that 700 is capacity.

Scott Martin ([35:32](#)):

I think let's put a number in there as a suggested serving. We don't tell them by 700 shares.

Jerry Cooper ([35:41](#)):

Okay. Let me ask our friend here. Given that we are creating marketing strategy for our marketing partner, HTUS, we would like to say that 700 shares at $35 a share would be at capacity to buy for that ticker. Do you agree or is there some other concept that you think would be more effective to get the advisor or self-directed investor to buy artificial scarcity? Can't do it, Scott. Oh,

Wil Raj ([36:40](#)):

Well

Jerry Cooper ([36:44](#)):

See, not only is this thing good, it is also keeps you out of trouble because any call to action phrase that you create would be tested something suggesting artificial scarcity. I love because that's going to keep you out of trouble. Would you agree?

Wil Raj ([37:09](#)):

Certainly.

Jerry Cooper ([37:10](#)):

Pardon me?

Wil Raj ([37:15](#)):

We agree.

Jerry Cooper ([37:16](#)):

Oh, you agree? Okay. Good, good, good.

Wil Raj ([37:18](#)):

Yeah.

Jerry Cooper ([37:19](#)):

All right. So let's ask Claude here. What would be the best way of doing this to alleviate any compliance concerns? And we're the marketer again, what do you recommend that we go out with as a call to action message for this promotion?

Harold Janecek ([37:54](#)):

No, this

Jerry Cooper ([37:58](#)):

Occasionally happens. You have to push the button again. Is there such a thing as an interpretation guide will?

Wil Raj ([38:30](#)):

I don't think so.

([38:30](#)):

Interpretation guide? You don't

Jerry Cooper ([38:31](#)):

Think so?

Scott Martin ([38:34](#)):

Implementation.

Jerry Cooper ([38:36](#)):

Well, it says download our implementation guide. I just want to understand if there's something that exists like

Wil Raj ([38:42](#)):

That. No, no. So we haven't developed one or made one available to advisors.

Jerry Cooper ([38:49](#)):

Okay. What is an interpretation guide? That means I misspelled something. That's why we use dictation here. So what it's asking you to do is to create a second document that would answer the question about implementation. It says,

Wil Raj ([39:44](#)):

Yeah, so we have an investment case, which could be considered an interpretation or implementation guide.

Jerry Cooper ([39:55](#)):

But what I'd like to do is either you let us write one or you write one, which I think the AI's inferred that you need it in order to get past the hurdle.

Wil Raj ([40:08](#)):

Yeah,

Jerry Cooper ([40:10](#)):

We could write one. You may not like it, but you could tweak it. How's that?

Wil Raj ([40:18](#)):

Yeah, sounds good.

Jerry Cooper ([40:22](#)):

Brandon, did you say something?

Brandon Hellman ([40:24](#)):

Sorry. No, I was just looking through to see what it was pulling could be possibly pulling up as the implementation guide or what it's trying to suggest.

Jerry Cooper ([40:34](#)):

Oh yeah, Brandon is just trying to figure out if there was such a thing as an implementation guide already. But there isn't the master. ACell said there wasn't. But we're looking at case studies. Is there such a thing as case studies in your world? Well,

Wil Raj ([40:53](#)):

There is investment cases, but no case studies.

Jerry Cooper ([40:58](#)):

Alright, well this is all conjecture. In other words, there are seven points here. And I think what we're saying is that there should be something like that. We could write it for you and give it to you for correction, or you could write one.

Wil Raj ([41:15](#)):

Sure.

Jerry Cooper ([41:18](#)):

All right. And then I'm fascinated with testing different call to actions. I love that concept that you created. Well, so that'll get us to where we need to be. But I think you see where we're going with all this. We need to construct a model that would make it so that every time an investor, self-directed investor or an advisor got to this point, they did something. They bought something, and it was at least, and this is an internal discussion, it was at least $25,000 worth. Makes sense?

Wil Raj ([42:01](#)):

Yeah. Yeah.

Jerry Cooper ([42:03](#)):

Alright. So you can see that if you did this long enough, strong enough, it would eventually give you everything you'd need in order to create the document. We do have Tony Flores. Tony Flores is the genius that writes all our marketing stuff. And I would put 'em on this project to create the words for you. So there's a machine version, which are the elements, and then there's Tony's brain. Scott, describe Tony's brain please.

Scott Martin ([42:38](#)):

Tony's brain is older and smarter than all the AI put together

Wil Raj ([42:46](#)):

To put it.

Scott Martin ([42:48](#)):

He knows what gets a human response.

Jerry Cooper ([42:54](#)):

So I think that what we're looking at is to find, tune the language here. The language here in this implementation. I love, I'm just falling in love with this concept of an implementation guide. There's probably investments that I would've probably have made if I had one of those things for that investment, but we want you to handle it.

Wil Raj ([43:23](#)):

Yeah, that sounds good. We will take a crack at that implementation guide I guess. And then so we have our current partnership with you guys. That includes two more emails and then

Jerry Cooper ([43:37](#)):

Yeah, that's a different thing. We haven't proposed a link. We're probably looking at 50 to a hundred hours worth of work here.

Harold Janecek ([43:47](#)):

So

Jerry Cooper ([43:49](#)):

You bought emails, which I think will be good. I looked at the emails results. I think Mark gave it to me. Lemme see. He did this. Did he not do that? Did Petra like this cover?

Wil Raj ([44:10](#)):

Yeah, we got it framed actually. What?

Harold Janecek ([44:15](#)):

We actually framed it.

Jerry Cooper ([44:16](#)):

You framed it. I love it.

Harold Janecek ([44:19](#)):

Love it. It's hanging in this room right now. Yeah.

Jerry Cooper ([44:22](#)):

Okay. Well whatever it is, I want to make sure that petrol likes whatever we do. A hundred

Wil Raj ([44:30](#)):

Percent. Yeah.

Jerry Cooper ([44:32](#)):

There it is. I found it. Okay, perfect. Okay, this one. Where do you get a 32.8% open rate on an email? I don't get it. That's unbelievable. So do the people that read our newsletters in Scott's writing or no, this

is actually your own email. So even though you probably didn't like your email, at least 101,000 other people did. That's pretty good. But these numbers are astonishing. On a side-by-side benchmark comparison, people don't hold up to this. Not at all. Look at that. 21.6 on average. That's amazing. So you have an audience that absolutely adores you. We have Petra on the wall on your cover. So I think all that together needs to be generated into an awesome email to make this work. So in essence turns into a money machine.

Wil Raj ([45:37](#)):

Yeah,

Jerry Cooper ([45:38](#)):

I love that.

Wil Raj ([45:40](#)):

So then I guess the next question is, will we be getting the, I guess, engagement or Airtable from that most recent email? Could you guys

Jerry Cooper ([45:55](#)):

Share? Yeah, no. Didn't you get all that from Chris? He's supposed to give that to you.

Wil Raj ([46:01](#)):

We haven't gotten the Airtable yet. And then we'll take this back to Petra for the proposal for three additional emails and we'll get back to you.

Jerry Cooper ([46:17](#)):

Yeah. Could I do you guys a favor? We have a service that makes the size of that cover small. We also have one that makes it big as a gift to her. Can I do one of those for her incentive frame please?

Wil Raj ([46:38](#)):

That sounds awesome, Jerry.

Jerry Cooper ([46:39](#)):

Okay, well let her know it's in route.

Wil Raj ([46:42](#)):

Okay. But I have

Jerry Cooper ([46:44](#)):

To get an approved by Scott. Do I have an approval on that

Scott Martin ([46:49](#)):

For me? Oh, of course. Yeah,

Jerry Cooper ([46:51](#)):

Course.

Scott Martin ([46:51](#)):

Whatever makes the people happy is a wonderful thing. That's what we do.

Jerry Cooper ([46:55](#)):

That's what we do. Alright. I love it. Alright, when you have time, Scott, could you ask Chris what happens to the

Scott Martin ([47:05](#)):

Yeah, yeah. I'm seeing him in 10 minutes, so I'll get on a little early.

Jerry Cooper ([47:08](#)):

Yeah, tell 'em that. Will is that camera Will, is that camera PTZ camera? Does it move around? How does it go?

Wil Raj ([47:21](#)):

Yeah, so this camera's up in a big conference room and whoever's talking it locks onto them talking. I don't know, it is called an owl.

Harold Janecek ([47:33](#)):

Hello? A what?

Wil Raj ([47:34](#)):

It's called an owl.

Jerry Cooper ([47:36](#)):

An owl.

Wil Raj ([47:37](#)):

Owl.

Jerry Cooper ([47:38](#)):

Alright, well you just taught me

Wil Raj ([47:39](#)):

This. Yeah.

Jerry Cooper ([47:46](#)):

Wow. So it knows to turn to Harold when Harold talks like zoom, right?

Wil Raj ([47:55](#)):

Yeah. So if Harold started talking, hello? Hello. Hello. Testing. Yeah, but

Jerry Cooper (48:01):

Harold, it moved to Harold before he talked. How did he do that?

Harold Janecek (48:06):

Maybe it sense his movement too or something? Maybe. Yeah.

Jerry Cooper (48:10):

Oh I see. It's a division. It's not panning across the room. It's just going to the other picture. I got it.

Wil Raj (48:18):

Yep.

Jerry Cooper (48:21):

Very, very good Technology. I love it. Anything with cameras? I'm a big student. Scott knows that

Scott Martin (48:28):

Since always. Yeah, and Brandon's already found that for you Jerry. So take a look at it.

Jerry Cooper (48:33):

Alright. Alright. Hey listen. So we need to kick Chris in the butt about your Airtable. That's going to happen fast. And as far as the three emails go, you get three one click trade compliant emails,

Harold Janecek (48:55):

But

Jerry Cooper (48:55):

It's going to be sure to work. But we going to need to pick your brains because everything that we're going to want to try may not fly. But we're going have it tested by you. How's that?

Wil Raj (49:08):

Cool. Sounds good.

Jerry Cooper (49:11):

Okay. Alright. Well listen, we appreciate the time. Wow. Almost an hour. You take care. I'm glad that Chris wasn't on this call because he'd have us cut off.

Scott Martin (49:22):

Chris had have other things to do, but great to see you guys. See you soon.

Wil Raj (49:26):

Thank

Scott Martin (49:26):

You

Wil Raj ([49:27](#)):
Brandon. Welcome.

Brandon Hellman ([49:29](#)):
Thanks.