

From a Book to a *Network*.

Your best prospects are not on a bought list. They are one introduction away, inside the relationships you have already built. Meerkat maps the network around every client, the colleagues, the boards, the neighbors, and surfaces the qualified prospects sitting one warm hop away, with the path to the introduction. Cold outreach becomes a warm intro through someone you both know.

WHAT YOU GET ON DAY ONE

The relationship graph behind every client, and the warm path to every prospect they can introduce.

500M

Profiles in the graph, with
50 to 200 verified
relationship edges each

5

Signal types resolved at
the person level: career,
education, board,
neighbor, household

200+

Warm second-degree
paths per record, the
qualified prospects already
in your network

1

Endpoint into Salesforce
FSC, Redtail, Wealthbox,
and your stack

The advisor who can ask a client for the right introduction wins the next client. The relationship graph makes that the default, not the privilege of the best-connected practice.

Mary Shea, PhD · Co-Founder & CGO · former Forrester Principal Analyst

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What's *inside*.

A short read on what changes when your book becomes a network. Written for principals, senior advisors, and the practice managers trying to grow through warm introductions instead of cold prospecting.

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Relationships are the most powerful force in business and in life. They are also the one force software could never see. Meerkat builds the layer that lets it, so any advisor, any practice, any household gets the warm path it already has.

Ralph Schonenbach · Founder & CEO, Meerkat

Cold prospecting does not work. *The warm path does.*

Every advisor knows it. Bought lists go cold. Cold emails go ignored. The best prospects in your market are already connected to the clients you serve, but the path to a warm introduction is invisible, so you keep dialing strangers while the well-connected advisor down the street gets introduced.

Your CRM holds the clients you already have. What it does not show is who they know. The former colleague now running a family office. The board member two seats from your prospect. The neighbor who is exactly the client you want. Those relationships exist in your book today. Nothing in your stack surfaces them, ranks them, or hands you the introduction.

The bought list

Purchased lists target by geography and a net-worth guess. They pitch strangers who already have an advisor and miss the prospect who would take your call because a mutual client asked. Cold prospecting is a tax on the advisor's week.

The hidden network

The highest-value prospects in your market are connected to the clients you already serve, through old colleagues, shared boards, and the same neighborhood. Without the graph, those warm paths stay invisible and the introduction never gets asked for.

The vague ask

"Who else do you know?" gets a shrug. A client wants to help, but cannot recall, on the spot, the right person to introduce. The specific, named ask is the one that converts.

The relationships that grow a wealth practice have always been there, sitting inside the book, invisible to every tool. Meerkat maps them, and turns the cold list into a warm introduction.

Ralph Schonenbach · Founder & CEO, Meerkat

Five signals. *One graph.*

Every meaningful relationship between two people falls into one of five categories. Meerkat resolves all five at the person level, refreshes them continuously, and ranks every path by strength, so for each client you can see the qualified prospects in their network and exactly who can make the introduction.

CAREER · WORKED TOGETHER

Same employer, overlapping tenure.

Verified employment history matched at the person level, across name changes, role changes, and moves. The former partner now running the family office.

EDUCATION · SAME SCHOOL

Same cohort, same lab, same advisor.

School, program, year, lab, advisor. The business-school section and the trustee network that introductions actually travel through.

BOARD · SAME ROOM

Same table, same vote.

Corporate boards, advisory councils, and foundation trusts joined to the individual. The shared board seat that turns a cold prospect into a warm ask.

NEIGHBOR · SAME BLOCK

Same street, same building.

Parcel-level property records and residential history across all 50 states. The neighbor relationship that bridges your client to a qualified prospect, and the property context that confirms the fit.

HOUSEHOLD · SAME ADDRESS

Who shares the address today.

The adults who currently live at the same address, from verified consumer files. The co-resident who is also a prospect, the second name behind the front door. Adults only, current residence. Meerkat does not map family structure.

THE PATH · ANY DEPTH

Five signals become one queryable graph. Ask for the warm paths between any two people, across any combination of the five edges above, ranked by strength and freshness. The path is not a sixth signal. It is what the five become when you connect them.

Career and board, every vendor has. Neighbor and current-resident signal, only Meerkat resolves, because only Meerkat has joined property and consumer data to the people layer. One endpoint, one view, and the warm path to every prospect your network can introduce.

The next client is *already in your book.*

The same client list. The same week of outreach. Run on a bought list, or run on the graph. The difference is between dialing strangers and asking a client to introduce you to someone who already trusts them.

The warm introduction · from a cold list to a client's intro.

THE REALITY

You buy a list of prospects in your metro and start dialing. The reply rate is near zero. The people who do pick up already have an advisor and no reason to trust you. A week of the team's time produces a handful of lukewarm conversations and no new relationships.

WITH MEERKAT

The graph shows that your best client served on a nonprofit board with three principals who match your ideal client profile, and two of them are not yet anyone's client. You ask for one introduction over coffee. It lands a first meeting the same week, warm, with trust in the room.

→ One warm introduction that opens a relationship, instead of a week of cold dials.

The specific ask · the names your client could not recall.

THE REALITY

You ask your best clients "who else do you know who might need an advisor?" They want to help. They name one or two people, or nobody, because no one can search their own network on demand. The referral engine every advisor relies on runs on memory, and memory is a poor index.

WITH MEERKAT

The graph maps every connection of every client in your book. You walk into the review with three specific, qualified names from that client's own network and a clear reason each is a fit. The ask becomes 'could you introduce me to her.' The introduction lands the same week.

→ Specific, named introductions your clients can actually make, instead of a vague referral ask.

200+

qualified warm paths per client, the prospects already inside your book

15-25%

warm-introduction conversion versus about 2% on cold outreach

1

ask, to the right client, for the named introduction the graph surfaced

Plugs into the tools *you already run.*

Meerkat is not another platform for your advisors to learn. It is the relationship graph beneath the CRM and planning tools they already live in, surfacing the warm path from your clients to your next clients, in place.

BEFORE MEERKAT		WITH MEERKAT
Prospect lists are bought by ZIP code	→	Prospects surfaced from inside your clients' networks
"Who else do you know?" gets a shrug	→	Specific, qualified names from each client's network
Cold outreach to strangers who never reply	→	Warm introductions through a mutual relationship
Referrals depend on what a client remembers	→	The full referral graph, mapped and queryable
COI relationships are tribal knowledge	→	Every center-of-influence path, ranked by strength
AI assistants see one record at a time	→	Your agent sees the graph, through MCP

ADVISOR CRM

Salesforce Financial Services Cloud · Redtail · Wealthbox · Practifi · Junxure

COMMUNICATION

Outlook · Gmail · Slack · Microsoft Teams · Zoom

PORTFOLIO & PLANNING

Orion · Tamarac · Black Diamond · Addepar · eMoney · MoneyGuidePro

AI SURFACES · VIA MCP

Claude · ChatGPT · Gemini · Custom agents and assistants

Connect once. Every tool your team already runs becomes a Meerkat surface. The advisor opens Redtail and each client record shows the qualified prospects in that client's network, with the introduction path attached. The principal asks Claude which clients can introduce the firm to the three prospects it most wants to reach. The answer arrives in a sentence, not a research project.

A pilot on *your top households*.

The fastest way to see what the graph does is to point it at the clients you already know. Send us your book. We send back the qualified prospects sitting inside it, and the client who can introduce you to each one.

STEP 01

Send us your client list.

A hundred client records. Names and contact are enough. We do not need account numbers, balances, or anything from the custodian.

STEP 02

We map the graph.

Within days the same list comes back with the warm second-degree paths around every client, the qualified prospects in those networks, and the ranked introduction path to each one.

STEP 03

You see the lift.

See the prospects already one introduction away, and exactly which client to ask. Walk into your next review with three specific names instead of a vague referral request.

- No multi-year contract. Pilot first, scale when the lift is clear.
- Your data stays yours. We enrich it. We do not resell it.
- Connectors live for the major stacks. Custom integrations on request.
- Built for solo advisors, RIA practices, and multi-family offices alike.

FROM NAMES TO NETWORKS

Every client is a network.
Now ask for the *introduction*.

Tell us about your book. We will show you the prospects already one introduction away.

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