

From a Book to a *Network*.

Your best prospects are not on a bought list. They are one introduction away, inside relationships your clients and colleagues already have. Meerkat shows who in your network knows the prospect you want to reach, how they know each other, and who can make the introduction. Cold outreach becomes a warm introduction through someone you both know.

WHAT YOU GET ON DAY ONE

Your firm mapped from its name alone. Nothing to send us to start.

625M

people in the graph

1.85B

connections, each backed by a dated record

5

kinds of connection: worked together, same board, recommended by name, same street, same household

15–25%

of prospects take a warm introduction, against about 2% who reply to a cold email

The advisor who can ask a client for the right introduction wins the next client. Meerkat 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. The intelligence to understand them has always been there, scattered and out of reach. Meerkat brings it together, so every practice can see the relationships it already has and put them to work.

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 hidden, 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 today. Nothing in your stack shows them, ranks them, or tells you who to ask.

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 a map, those warm paths stay hidden 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 are already in the book, hidden from every tool. Meerkat shows them, and turns the cold list into a warm introduction.

Ralph Schonenbach · Founder & CEO, Meerkat

Five kinds of connection. *Every path shows its evidence.*

Every connection Meerkat shows comes from a dated record, so you can see why two people know each other before you ask for the introduction. Paths are ranked by strength, strongest first.

WORKED TOGETHER

Both at Deloitte, 2014 to 2018

Twenty years of dated employment history, matched to the person across name and role changes. The former colleague now running a family office.

SAME BOARD

Same board since 2019

Corporate boards, advisory councils and foundation boards, with dates. The shared board seat that turns a cold prospect into a warm ask.

RECOMMENDED BY NAME

Written recommendation on file

Public profile recommendations, where one person has vouched for another by name. The strongest signal that an introduction will be welcome.

SAME STREET

Same street in Winnetka, eight years

Licensed deed and assessor records in the United States. The neighbor who connects your client to a qualified prospect.

SAME HOUSEHOLD

Same home address

Adults who currently share an address, from household and address records. Adults only, current residence. Meerkat does not map family structure.

WEALTH CONTEXT

Qualify before you ask.

SEC filings and a property-based capacity model show which prospects fit your minimums. Property values only, never account balances.

Public records and licensed data. Nothing scraped, nothing pooled. Nobody else offers careers, boards, deeds and households together.

The next client is *already in your network*.

The same week of outreach, run two ways. 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 introduction

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.

WITH MEERKAT

Meerkat shows that your best client served on a nonprofit board with three principals who match your ideal client profile, for six years. You ask for one introduction over coffee. It lands a first meeting the same week, with trust already 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 runs on memory, and memory is a poor index.

WITH MEERKAT

With your client list loaded, you walk into the review with three specific, qualified names from that client's own network and how the client knows each one. 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.

ILLUSTRATIVE EXAMPLES

2%

reply to a cold email

15–25%

take a warm introduction

1

ask, to the right client, for a named introduction

Answers where *you already work.*

Meerkat is not another platform for your advisors to learn. Ask who can introduce you in Claude, ChatGPT or Gemini, or see it alongside your CRM. No new app to open.

BEFORE MEERKAT	WITH MEERKAT
Prospect lists are bought by ZIP code	→ Prospects found 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	→ Every connection mapped, with how they know each other
Center-of-influence relationships live in people's heads	→ Every center-of-influence path, ranked by strength
AI assistants see one record at a time	→ Ask Claude who can introduce you, and get the path back

AI ASSISTANTS

Claude · ChatGPT · Gemini

CRM

Salesforce · HubSpot

YOUR OWN DATA

Add your client list at no cost. It stays in your firm's own workspace.

The principal asks Claude which clients can introduce the firm to the three prospects it most wants to reach. The answer comes back in a sentence, with the path and the reason, not a research project.

Start with your firm. *Then add your book.*

The fastest way to see what Meerkat does is to start with the relationships your firm already has. We map your firm from its name alone, before you send us anything.

STEP 01

We map your firm.

From your firm's name alone: your advisors, their careers, boards and neighborhoods, and the people they can reach. No data from you, no NDA.

STEP 02

Add your client list.

When you are ready, load your client list. Names and contact details are enough. We do not need account numbers, balances, or anything from the custodian. Imports are free.

STEP 03

Ask for the introduction.

See the prospects already one introduction away and exactly which client or colleague to ask. Walk into your next review with three specific names.

- One workspace per firm. Nothing you load is visible to anyone else.
- Public records and licensed data. Nothing scraped, nothing pooled.
- Any individual can ask to be removed, and stays removed on every refresh.
- Plans for individual advisors, teams and whole firms.

FROM NAMES TO NETWORKS

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

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

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