

# Meridian

## COMPANY

### Meridian is the modern system of record for private-market investing

Built by a former Blackstone private-equity investor, **Meridian was created to replace the patchwork of CRMs, spreadsheets, and data vendors that slow down deal work.** After seeing how even the best firms lose time, context, and opportunities to fragmented tooling, we built a single platform that unifies deal flow, relationships, and market intelligence in one system designed for how investment teams actually source and close.

## PRODUCT

### Meridian is a vertically integrated deal platform for private markets

It combines **CRM, live company data, workflow automation, and embedded AI into one system of record for sourcing, diligence, and execution.** Instead of stitching together tools like DealCloud, PitchBook, SourceScrub, and internal spreadsheets, teams run their entire pipeline on Meridian.

AI agents continuously enrich companies, surface relevant signals, and track activity across email, meetings, and documents, so every investment professional always sees the **full, current picture of every relationship and opportunity.**

#### 🚀 Increase deal volume and quality

AI-driven sourcing and company discovery surface more relevant opportunities earlier.

#### 🗑️ Eliminate manual work

Automatic email, calendar, and data sync remove CRM busywork and errors.

#### 👛 Lower data costs

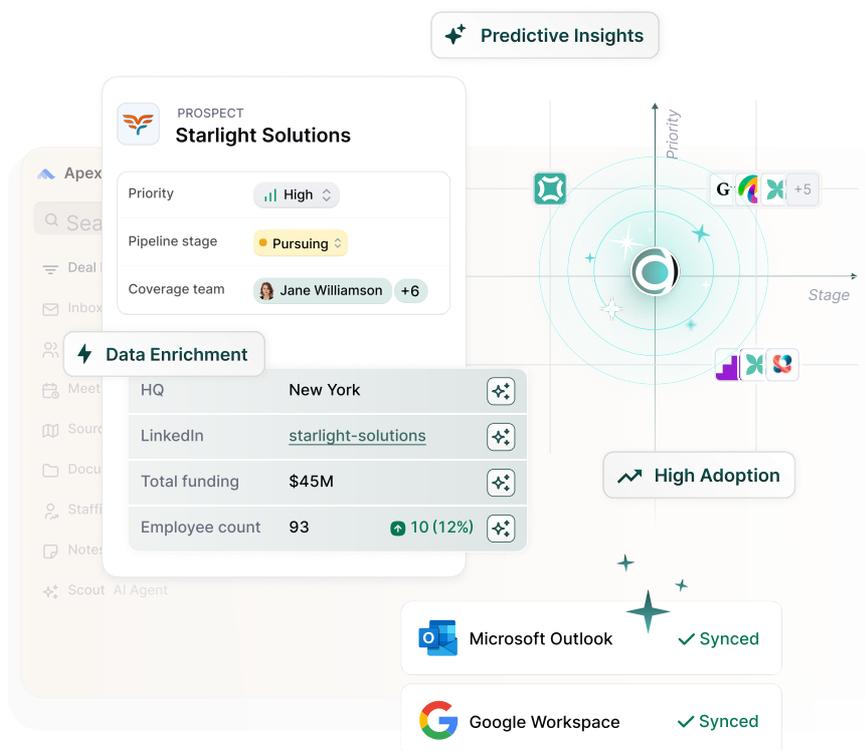
Built-in market and company data replace large third-party spend.

#### 👤 Drive firm-wide adoption

A single, intuitive system becomes the source of truth for the whole team.

#### 🔗 Strengthen relationships

Every interaction, introduction, and touchpoint is captured and analyzable.



 Power your deal team with the best software

[Request a Demo](#)