

# Meridian Capital Partners

Firm Overview & Investor Directory | Confidential

## Firm Summary

Founded	2018
AUM	\$42.8M
Strategy	Value-oriented long/short equity, primarily mid-cap U.S. equities
Fund	Meridian Value Fund, LP
Vintage	2018 (Fund I), 2022 (Fund II)
Management Fee	1.5% of AUM
Performance Fee	20% over 6% hurdle
GP Commitment	\$2.1M (5% of Fund II)
Administrator	Apex Fund Services
Auditor	EisnerAmper LLP
Legal Counsel	Seward & Kissel LLP
Prime Broker	Interactive Brokers

## Team

Name	Title	Email	Phone	Focus
James Chen	Managing Partner / PM	jchen@meridiancap.com	(312) 555-0100	Portfolio mgmt, macro, financials
Sarah Okafor	Senior Analyst	sokafor@meridiancap.com	(312) 555-0101	Technology, healthcare
Ryan Patel	Analyst	rpatel@meridiancap.com	(312) 555-0102	Industrials, energy
Emily Watson	Analyst	ewatson@meridiancap.com	(312) 555-0103	Consumer, real estate
Marcus Rivera	Operations / IR	mrivera@meridiancap.com	(312) 555-0104	Fund ops, investor relations
Alex (AI)	AI Research Assistant			Screening, modeling, monitoring

## Investor / LP Directory

Name	Type	Commitment	Funded	Contact	Phone	Last Contact	Notes
Lakewood Family Office	Family Office	\$5,000,000	\$5,000,000	Richard Lakewood	(312) 555-0201	Jan 15, 2026	Founding investor. Annual mee
Northshore Endowment	Endowment	\$3,500,000	\$3,500,000	Dr. Patricia Hwang	(847) 555-0202	Feb 1, 2026	Quarterly letter due. May incre
Summit Wealth Advisors	RIA / Allocator	\$4,200,000	\$4,200,000	David Kowalski	(312) 555-0203	Dec 20, 2025	Represents 6 underlying clients
Margaret Chen Trust	Individual	\$2,000,000	\$2,000,000	Margaret Chen	(312) 555-0204	Jan 28, 2026	GP family. Long-term holder.
Prairie Capital Partners	Fund of Funds	\$6,500,000	\$5,200,000	Tom Blackwell	(312) 555-0205	Jan 10, 2026	Fund II investor. Unfunded \$1,3
Midwest Teachers Pension Fund	Pension	\$3,000,000	\$3,000,000	Susan Park	(217) 555-0206	Nov 15, 2025	OVERDUE contact. Needs Q4

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Greenfield Foundation	Foundation	\$2,500,000	\$2,500,000	Alex Greenfield	(312) 555-0207	Feb 5, 2026	ESG focus. Wants impact report.
Harrison Capital LLC	Family Office	\$4,000,000	\$3,200,000	Michael Harrison	(312) 555-0208	Dec 5, 2025	OVERDUE. Unfunded \$800K.
Coastline Ventures	VC / Crossover	\$3,500,000	\$3,500,000	Priya Sharma	(415) 555-0209	Jan 22, 2026	SF based. Co-investment interest.
BlueStar Insurance Co	Insurance	\$2,800,000	\$2,800,000	Robert Yang	(312) 555-0210	Feb 10, 2026	Conservative. Low risk tolerance.
Daniel & Lisa Kim	Individual	\$1,500,000	\$1,500,000	Daniel Kim	(312) 555-0211	Jan 5, 2026	Friends & family. Patient capital.
Prospect: Oak Street FO	Prospect	\$0	\$0	Jennifer Oak	(312) 555-0212	Feb 12, 2026	MET AT CONFERENCE. Interested.
Prospect: Atlas Pension	Prospect	\$0	\$0	William Torres	(614) 555-0213	Feb 8, 2026	Intro from Tom Blackwell. Initial interest.

Total committed: \$38.5M | Total funded: \$36.4M | Unfunded: \$2.1M | Prospects: 2 (\$3-8M potential)