

# Find more deals. Win them faster.

AI workers for financial services. Not agents, not copilots. A worker has a job title, a scope, and accountability to an outcome. It runs around the clock on your data and your systems, so the work that used to fill the first month of a mandate now happens before it starts.

PRIVATE EQUITY

Find the deal before the market does.

INVESTMENT BANKING

Win the mandate before the pitch.

WEALTH MANAGEMENT

Grow the book without the busywork.

THE SUITE

**Five workers, one engine.** Each has a job title, a scope, and accountability to an outcome. Start with one.

- B Bogan** BUY-SIDE ● LIVE  
 Turns public signals into opened deals, and drafts the first touch in your voice.
- AT Atlas** SELL-SIDE AVAILABLE  
 Runs the sell-side process end to end and brings qualified buyers to the table.
- DR Deal Room** POST-LOI AVAILABLE  
 Carries a signed deal from LOI through diligence to close, so nothing stalls the timeline.
- M Mira** RESEARCH AVAILABLE  
 Screens deal flow against your thesis, scores the fit, and routes matches to the right partner.
- R Reed** SUPPORT AVAILABLE  
 Inbound questions and scheduling across web, SMS, and voice, around the clock.

**CUSTOMERS**

**12 SPEARHEAD**  
verified owners surfaced

One county of public filings, joined to the business registry and verified in two weeks. Nothing spent on data. Repeatable in any county.

**3x OCEANPARK**  
more qualified deal flow

Tripled the top of the funnel in a single quarter, without adding to the origination team. Every conversation started warm.

**HOW IT FITS**

**Works inside the stack your desk already runs in.**

Grounded in your data and your systems, not the open web, so what a worker produces reads like your desk made it. No rip and replace, and nothing for your team to relearn.

**INTEGRATIONS**

Salesforce      ZoomInfo  
DealCloud      Apollo

RUNS ON YOUR INFRASTRUCTURE · ON THE MODEL YOU CHOOSE · EVERY ACTION AUDITABLE · SOC 2

**See what a worker does on your desk.**

Tell us the outcome you need, from the first signal to the signed deal. We will show you what it finds, on your data, in two weeks.

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