

Results that speak for themselves.

Independent, fee-only investment management from one of New England's most decorated advisory teams.

**Our client portfolios returned 28.4% last year**

Meridian's flagship growth strategy delivered 28.4% in 2025 — nearly triple the return of the average adviser.

**Ranked #1 Wealth Manager in New England**

Recognized as the region's top firm for performance and service, year after year.

**SEC-registered — the highest standard of skill**

Our SEC registration reflects the highest level of professional skill, training, and government vetting available.

**"They turned my \$800K into \$1.4M in four years."**

— Linda M., retired teacher. Real client. Real results. Yours could be next.

Move your portfolio to Meridian in one phone call.

Schedule your complimentary portfolio review

meridian.intercepta.ai/contact