MeridianLink Intelligence Doc Agent for Mortgage Now Live With Customers, General Availability Expected in Late Q4 2026

AI-powered agent helps mortgage lenders streamline document workflows, reduce manual work, increase staff capacity and reduce operating costs

IRVINE, Calif. — October 8, 2026 — MeridianLink®, a leading provider of lending technology for community financial institutions, today announced that **MeridianLink® Intelligence Doc Agent for Mortgage is now live with early access customers**, bringing embedded AI-powered document intelligence into real-world mortgage lending workflows. Following its initial customer deployments, MeridianLink expects Doc Agent for Mortgage to reach **General Availability in late Q4 2026**. MeridianLink will expand MeridianLink Intelligence across the lending lifecycle, with **Doc Agent for Consumer planned for early 2027**.

Part of **MeridianLink Intelligence, nicknamed "Millie,"** Doc Agent for Mortgage is designed to help lenders automate and streamline document-intensive processes that typically create significant manual work for mortgage teams. By bringing AI directly into the mortgage lending workflow, Doc Agent helps mortgage professionals spend less time on repetitive document tasks and more time focused on borrowers and higher-value work.

"Having customers live on Doc Agent for Mortgage is an important milestone for MeridianLink Intelligence and for our customers who are looking for practical ways to apply AI to their businesses," said **JP Kelly, Senior Vice President of Mortgage at MeridianLink**. "We built Doc Agent to address a very real source of operational friction in mortgage lending by addressing work that can consume valuable team capacity without directly advancing the borrower experience. In a challenging market where lenders are under pressure to manage operating costs and do more with existing teams, the ability to have an AI agent take on this work continuously can help increase capacity, reduce manual effort and free lending professionals to spend more time focused on borrowers. We're now seeing Doc Agent work in live customer environments, and the feedback we're getting is confirming the need we saw in the market while helping us refine the experience ahead of General Availability."

Practical AI for Mortgage Workflows

Mortgage lending generates significant amounts of documentation and manual processing. From reviewing submitted documents to determining whether files are complete and extracting information, these tasks can consume valuable time for lending teams.

Doc Agent for Mortgage is designed to help automate these processes within the existing MeridianLink Mortgage workflow, with human oversight and control built in to keep lending professionals at the center:

- **Intelligent document review** to help assess submitted documents for completeness, quality and relevance
- **Automated data extraction** to reduce manual rekeying and repetitive data-entry tasks
- **Streamlined document requests** to automatically translate complex lending requirements into easily understood document requests for borrowers
- **Workflow assistance** that helps move applications forward while reducing manual intervention

“Doc Agent helps us improve accuracy for our members by filling in application data our team hasn’t always had time to prioritize,” said **Andrew Kotaska, Director of Mortgage Lending and Member Solutions, Credit Union of Colorado**. “It takes real lift off our mortgage staff and I’m excited to see how the team responds and the member experience improves.”

AI That Works Where Lending Happens

Doc Agent for Mortgage is the first agent within **MeridianLink Intelligence**, a growing set of role-based AI capabilities built natively into **MeridianLink One**. Rather than requiring financial institutions to adopt a separate AI tool, MeridianLink Intelligence brings practical, agentic intelligence directly into the workflows and applications that lending teams already use. Doc Agent can work continuously behind the scenes—taking on tasks, responding to what is happening within an application and helping move work forward—while keeping lending professionals in control. This enables teams to apply AI not simply to automate individual tasks, but to take on work across the lending process and increase their capacity to focus where human expertise matters most.

“Community financial institutions don’t need more AI hype or endless experiments. They need practical intelligence that goes to work solving real problems for their teams and their customers,” said **Troy Coggiola, Chief Product and Strategy Officer, MeridianLink**. “We’re building Millie to work alongside people, embedded in the workflows they already rely on. With an agentic approach, Millie can take on work continuously in the background, helping teams move applications forward while keeping people in control of the decisions that matter. Having Doc Agent live with customers gives us the opportunity to learn from real-world use and deliver intelligence that can make a meaningful difference in their day-to-day operations. It sets us up to deliver on the AI vision we communicated to our customers at MeridianLink LIVE! in May.”

MeridianLink will expand **MeridianLink Intelligence** across the lending lifecycle, with **Doc Agent for Consumer planned for early 2027**. The company’s broader vision is to use embedded intelligence to take action across workflows, automate what can be automated, increase workforce capacity and improve operational efficiency, while enabling lending professionals to spend more time focused on consumers. In this model, AI works

continuously alongside people—not as a replacement for human judgment, but as an intelligent teammate that helps move work forward.

About MeridianLink

MeridianLink is the modern connection between human experience and technology, empowering community financial institutions to deliver better lending experiences through intelligent automation, trusted AI and deep industry expertise. Through MeridianLink One, financial institutions can connect solutions, data, intelligence and workflows across the lending lifecycle to simplify experiences for both consumers and the people who serve them.

That's Lending Made Human.

For more information, visit **www.meridianlink.com**.

To learn more about MeridianLink Intelligence, click here.