

Project name

Designed for

Designed by

Date



1. Know yourself

KNOW YOUR BUSINESS
Are you investor ready?

KNOW YOUR NEEDS
How much money do you need
and for what exactly?

LOOK AHEAD
What is your exit strategy?

IDENTIFY YOUR SMART NEEDS
What expertise or contribution do you
need from your investor
(beyond money)?



2. Choose

CHOOSE AN INVESTMENT TYPE
What type of investment best fulfills your needs?

CHOOSE AN INVESTOR TYPE
Which type of investor best aligns with your financial and smart needs?



3. Get smart

YOUR PROPOSITION
What is your offer to this investor?

THEIR PROPOSITION
What do you know about this investor's
offerings?

YOUR TERMS
What terms are you willing to
accept?

THEIR TERMS
Do you know this investor's terms?

INVESTOR RELATIONSHIP GOALS
What kind of role do you want this
investor to play?

INVESTOR RELATIONSHIP OFFER
What kind of role does this investor
want to play?