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A data room investors *trust*

Build it before the first investor call, not after the term sheet. Investors judge the company by how fast they can find things.

01 · COMPANY

☐ Certificate of incorporation and bylaws☐ Cap table, fully diluted☐ Board minutes, last 24 months

02 · FINANCIALS

☐ Monthly management accounts, last 24 months☐ Audited or reviewed annual accounts☐ Budget vs actuals, this year☐ 13-week cash forecast☐ The financial model, with its assumptions

03 · REVENUE

☐ Customer list with revenue by customer☐ Top 10 customer contracts☐ Retention and cohorts☐ Pipeline by stage

04 · TEAM

☐ Org chart☐ Key employment contracts☐ Option plan and grants

05 · LEGAL AND IP

☐ IP assignments from founders and staff☐ Material contracts and leases☐ Disputes, past and pending

06 · TAX AND COMPLIANCE

☐ Tax filings, last three years☐ Sales tax and payroll registrations☐ Insurance policies

Three habits

Name every file the same way: 02.3 Budget vs actuals 2026.pdf

Keep a Q&A log, so every answer is written once.

Add documents as they're asked for, then move them into the right folder.