

DEAL ACTIVITIES GRID

Summary of typical deal activities by role for a fundraising round

	Pitch Deck	Source Investors	Pitch Investors	Evaluate Term Sheets	Negotiate & Sign Term Sheet	Due Diligence	Close Deal
CEO	Populate with data	Identify prospective investors	Attend pitch meetings	Review term sheets	Negotiate & sign	Assist due diligence	Prep & review, sign closing docs
CFO	Historical financials & financial projections	May be able to refer to investors	Attend pitch meetings	Review term sheets	Advise on negotiations	Lead due diligence, maintain data room	Complete due diligence, advise & recommend
INVESTMENT BANKER	Develop format & create	Identify prospective investors	Attend pitch meetings	Review term sheets & recommend	Lead company negotiations & advise	Advise on due diligence	Conduct negotiation, advise & recommend
ACCOUNTANT	Nothing	May be able to refer to investors	Nothing	Nothing	Nothing	Financial review or audit, tax opinion	Provide final opinion
LAWYER	Nothing	May be able to refer to investors	Nothing	Review term sheets & recommend	Participate in negotiation discussions	Assist with legal due diligence	Advise & recommend, manage closing docs