

DOCUMENT CHECKLIST / 01

PitchLab

A clearer pitch starts with the story you have today.

Start with what you have

Idea-stage ventures are welcome. You do not need revenue, incorporation documents or a cap table to begin.

1 Include these intake details

- ☐ **Company and contact.** Company name, contact name, role and email; website if available.
- ☐ **Assessment objective.** What question or decision should this assessment help you address?
- ☐ **Primary report audience.** Choose Founder or Investor, separately from your objective. If both, choose one primary audience.
- ☐ **Order details.** Order reference, payment receipt and checkout email. Do not include card details.

2 Minimum material to begin

- ☐ **Pitch material.** Your current deck as PPTX or readable PDF, or a 1-2 page idea outline covering the problem, customer, solution and intended business model.
- ☐ **Pitch context.** Your pitch goal and venture stage, including idea stage. Add pitch length and the judge or pitch audience if known.

3 Add supporting evidence

Send these if available and relevant. This is not a requirement to create every document listed.

- ☐ **Competition requirements.** Official rubric, rules, submission requirements and deadline, if available.
- ☐ **Current delivery material.** Speaker notes or script. Add a recording only if you want feedback on live delivery.
- ☐ **Support for claims.** Dated sources for market size, customer findings, traction, financial or technical claims used in the pitch.
- ☐ **Useful visuals.** Demo link, screenshots, product images and brand assets you are authorized to share. Editable PPTX helps with deck revisions.

What missing information means

Missing supporting material limits feedback. Live delivery remains unassessed without a reviewed recording. Before-and-after visuals depend on the source deck and available authoring tools.

4 Prepare your submission

- ☐ **Make files usable.** Use readable PDF or PPTX for decks; XLSX or CSV for financials and metrics. Name files clearly and include dates or versions.
- ☐ **Make numbers traceable.** Label reporting periods, currency and metric definitions. Separate actuals, forecasts and assumptions; include source links where available.
- ☐ **Identify gaps.** Mark missing items "not available" or "not applicable" and explain briefly. Submit existing records and label any estimates clearly.

Send to FUNDABILITY

Email your materials to

orders@gofundability.com

Subject: PitchLab | Company name | Order

reference

FUNDABILITY confirms completeness and timing. Processing begins after verified payment, order acceptance and complete required materials.

Before sharing

Standard submissions have no NDA. Share only authorized materials and redact unnecessary personal, financial-account and sensitive information. Do not send passwords, card details, government IDs, patient records, classified/CUI or export-controlled technical data through standard intake. Contact support@gofundability.com before sharing restricted material.

Reliance and verification disclaimer

FUNDABILITY relies on information you provide and any sources cited in the report. We do not independently audit or authenticate submissions, or certify company claims as accurate or complete. Any consistency or corroboration checks are limited to the evidence reviewed. You are responsible for accurate, complete, authorized submissions. AI-assisted findings may contain errors; verify material facts before relying on them. This is decision support, not professional advice or a guarantee of outcomes.

DOCUMENT CHECKLIST / 02

Venture Assessment

Show the investment case and the evidence behind it.

Start with what you have

Start with the core material. Supporting records strengthen the review; early-stage ventures should submit what actually exists.

1 Include these intake details

- ☐ **Company and contact.** Company name, contact name, role and email; website if available.
- ☐ **Assessment objective.** What question or decision should this assessment help you address?
- ☐ **Primary report audience.** Choose Founder or Investor, separately from your objective. If both, choose one primary audience.
- ☐ **Order details.** Order reference, payment receipt and checkout email. Do not include card details.

2 Minimum material to begin

- ☐ **Company material.** Current pitch deck or company summary describing the customer, product, business model, team and funding ask.
- ☐ **Assessment context.** Confirm funding stage and primary sector. State the amount being raised and use of funds, or say "not raising".

3 Add supporting evidence

Send these if available and relevant. This is not a requirement to create every document listed.

- ☐ **Customers and traction.** Dated KPI or sales exports, customer interviews, pilots, LOIs, contracts or invoices. Distinguish planned, signed and paid activity.
- ☐ **Product and technology.** Demo, roadmap, release status and test results. Distinguish planned, built and live capability.
- ☐ **Financial position.** Available financial summary, cash, burn/runway and forecast assumptions. Separate grants, services and recurring product revenue.
- ☐ **Team and ownership.** Team roles or bios; current cap table and any SAFE, note or proposed financing terms, if available.
- ☐ **Market and competition.** Named competitors, pricing, market sources and customer win/loss evidence.

+ Extra context, if this applies

- ☐ **Defense, GovTech or Cybersecurity.** Identify the first paying customer type: Commercial, Government, Prime or Mixed. If Mixed, identify the first target.
- ☐ **BioTech / Life Sciences.** Confirm subtype and scientific development stage; add available scientific or regulatory evidence.

What missing information means

Missing evidence is a review limitation, not proof that a claim is false. Evidence-Verified Readiness reflects support in reviewed evidence; it is not certification of company facts.

4 Prepare your submission

- ☐ **Make files usable.** Use readable PDF or PPTX for decks; XLSX or CSV for financials and metrics. Name files clearly and include dates or versions.
- ☐ **Make numbers traceable.** Label reporting periods, currency and metric definitions. Separate actuals, forecasts and assumptions; include source links where available.
- ☐ **Identify gaps.** Mark missing items "not available" or "not applicable" and explain briefly. Submit existing records and label any estimates clearly.

Send to FUNDABILITY

Email your materials to

orders@gofundability.com

Subject: Venture Assessment | Company name |

Order reference

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Controlled beta | v1.11.0

Updated 20 October 2026

DOCUMENT CHECKLIST / 03

ValuationLab

Make valuation assumptions visible and traceable.

Start with what you have

A young or pre-revenue company can submit limited data. Identify what is unavailable and label forecasts and assumptions clearly.

1 Include these intake details

- ☐ **Company and contact.** Company name, contact name, role and email; website if available.
- ☐ **Assessment objective.** What question or decision should this assessment help you address?
- ☐ **Primary report audience.** Choose Founder or Investor, separately from your objective. If both, choose one primary audience.
- ☐ **Order details.** Order reference, payment receipt and checkout email. Do not include card details.

2 Minimum material to begin

- ☐ **Company and purpose.** Current deck or company overview, the valuation purpose and proposed raise if relevant. Include whatever financial data exists, or state that none exists.
- ☐ **Valuation context.** Confirm funding stage, valuation date and currency. State the instrument: priced equity, SAFE, convertible note, none or unknown.
- ☐ **Revenue status.** State pre-revenue, revenue-generating or unknown. Funding stage must be confirmed; instrument and revenue status may be unknown.

3 Add supporting evidence

Send these if available and relevant. This is not a requirement to create every document listed.

- ☐ **Available financial history.** P&L, balance sheet and cash-flow records for the last 12-24 months if available; life-to-date for younger companies.
- ☐ **Forecast and drivers.** Editable forecast workbook with revenue, cost, capital-spending and working-capital assumptions, to the extent developed.
- ☐ **Revenue quality.** Revenue or ARR reconciliation, retention and margins. Separate grants, services and recurring product revenue.
- ☐ **Financing and ownership.** Cash, debt and senior claims as of the valuation date; cap table, options, warrants, SAFEs, notes and proposed round terms or rights.
- ☐ **Market or asset evidence.** Dated comparable financings or transactions, named peers and source links; asset or replacement-cost records if relevant.

+ Extra context, if this applies

- ☐ **IP costs and margin.** For the IP component, provide dated historical R&D labor and filing/legal costs, current gross margin with its definition and period, and source records.
- ☐ **IP scope and rights.** Identify relevant patents, software architecture or trade secrets. Provide granted-patent status, ownership/assignments, licenses and encumbrance summaries. Do not reveal underlying trade secrets through standard intake.
- ☐ **IP scenario workbook.** Where available, provide upside, base and downside projections for years 1-5, with revenue and unlevered free cash flow each year. Use the valuation currency and label assumptions and their dates.
- ☐ **Market and liquidation basis.** Provide the dated sector-median enterprise-value/revenue multiple and the basis for any patent liquidation estimate. Identify assumptions and missing information; do not substitute zero for an unavailable input.
- ☐ **Applicability and incomplete inputs.** This separate component supports Pre-seed, Seed and Series A with known revenue status. Its strict input format requires all three five-year tracks even for cost-only profiles. Submit only existing records; do not invent forecasts to complete it.

What missing information means

A review can proceed with limited data, but a numeric range may remain "Valuation not established". IP scenarios and their separate model IP reference are illustrative and conditional, not authenticated IP appraisals or guaranteed sale prices. The IP reference is not added to enterprise value. Missing inputs can leave this component unavailable. A SAFE cap is not a priced-round valuation, and the report is not a certified appraisal.

4 Prepare your submission

- ☐ **Make files usable.** Use readable PDF or PPTX for decks; XLSX or CSV for financials and metrics. Name files clearly and include dates or versions.
- ☐ **Make numbers traceable.** Label reporting periods, currency and metric definitions. Separate actuals, forecasts and assumptions; include source links where available.
- ☐ **Identify gaps.** Mark missing items "not available" or "not applicable" and explain briefly. Submit existing records and label any estimates clearly.

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Email your materials to

orders@gofundability.com

Subject: ValuationLab | Company name | Order reference

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Before sharing

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DOCUMENT CHECKLIST / 04

Full Due Diligence

Build an organized evidence base for deeper review.

Start with what you have

Send an organized document set with a file index. Share only authorized material; FUNDABILITY confirms whether the agreed scope can proceed.

1 Include these intake details

- ☐ **Company and contact.** Company name, contact name, role and email; website if available.
- ☐ **Assessment objective.** What question or decision should this assessment help you address?
- ☐ **Primary report audience.** Choose Founder or Investor, separately from your objective. If both, choose one primary audience.
- ☐ **Order details.** Order reference, payment receipt and checkout email. Do not include card details.

2 Minimum material to begin

- ☐ **Core company material.** Current deck or company summary and an index of available supporting files with dates or versions.
- ☐ **Diligence context.** Confirm funding stage and primary sector, funding ask and use of funds if relevant. Identify known material risks, disputed claims and prior diligence questions, if any.

3 Add supporting evidence

Send these if available and relevant. This is not a requirement to create every document listed.

- ☐ **Commercial.** Customer contracts, pilots, invoices, pipeline, retention and concentration; identify planned, signed and paid business.
- ☐ **Financial.** Available actual statements, cash flow and forecast drivers. Include 12-24 months if they exist; life-to-date for younger companies.
- ☐ **Capital and financing.** Cash, debt, cap table, options, SAFEs, notes and financing rights. Redact account numbers.
- ☐ **Product and technical.** Demo, architecture summary, roadmap, release status and available test, security or performance results.
- ☐ **Corporate, team and IP.** Formation and ownership records, team responsibilities, IP assignments, licenses and key rights, where applicable.
- ☐ **Legal and regulatory.** Applicable approvals, permits, compliance evidence, material disputes and restrictions. Identify pending or missing items.
- ☐ **Market and competition.** Named rivals, pricing, research sources and customer win/loss evidence.

+ Extra context, if this applies

- ☐ **Defense, GovTech or Cybersecurity.** Identify the first paying customer type: Commercial, Government, Prime or Mixed. If Mixed, identify the first target.
- ☐ **BioTech / Life Sciences.** Confirm subtype and scientific development stage; add available scientific or regulatory evidence.

What missing information means

The report covers the documents and sources reviewed. Missing sections are stated as limitations; valuation analysis depends on sufficient inputs. This service is not a statutory audit or legal certification.

4 Prepare your submission

- ☐ **Make files usable.** Use readable PDF or PPTX for decks; XLSX or CSV for financials and metrics. Name files clearly and include dates or versions.
- ☐ **Make numbers traceable.** Label reporting periods, currency and metric definitions. Separate actuals, forecasts and assumptions; include source links where available.
- ☐ **Identify gaps.** Mark missing items "not available" or "not applicable" and explain briefly. Submit existing records and label any estimates clearly.

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