

RESOURCES · FOR FOUNDERS

# Fundraising Readiness Checklist

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Before you talk to an investor, you should be able to answer every line below without hesitation. If any feel fuzzy, that is exactly the gap a fractional CFO closes in the first fortnight.

## The numbers you must know cold

- Monthly burn (gross and net)
- Runway in months (cash ÷ net burn)
- Gross margin, and the trend over 6 months
- CAC and CAC payback period
- Net revenue retention / churn
- Revenue: MRR/ARR and month-on-month growth
- Unit economics: contribution margin per customer

## The data room

- Cap table (clean, current, fully diluted)
- Historical financials (P&L, balance sheet, cash flow)
- Financial model (3 statements, 18–24 month projection)
- Key metrics dashboard
- Customer / revenue concentration
- Existing agreements (major customers, suppliers, debt)
- Org chart and key hires planned

## The narrative

- One-line description anyone can repeat
- The problem, in the customer's words
- Why now (what changed in the market)
- Traction proof, not promises
- Use of funds, tied to milestones
- The ask: amount, and what it buys (runway + milestones)

## Before you send the deck

- Every number in the deck ties to the model
- You can defend each assumption
- You know your next two funding milestones



- You have a target list of the right investors

*Need a hand getting fundraise-ready? A Senior Intern fractional CFO does exactly this. — [theseniorintern.com](https://theseniorintern.com)*