Fundraising preparation handoff / 01

CONNECT QUESTIONS TO TWO DELIVERABLES

Use Question A/B, Model M1 and Presentation P1. Record references only, not figures, formulas or pitch content.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Question A / preparation topic / management question reference

A: proposed model output reference / separate presentation section reference

A: input-owner role / unanswered question / CFO reply reference

Question B / preparation topic / management question reference

B: proposed model output reference / separate presentation section reference

B: input-owner role / unanswered question / CFO reply reference

Preparation only. Not a pitch, financial or legal advice, compliance review or consistency certification. No sharing authority or funding promise. Keep figures and private documents out.

Fundraising preparation handoff / 02

ASK THE CFO TO EXPLAIN THE CONNECTION

A matching label is not proof of consistency. Ask for an explanation; keep underlying financial records private.

Which model output and presentation section address each preparation question?

Which input-owner role should resolve the missing context for A or B?

What period or scope difference between the two references needs explaining?

Which versions are you discussing, and what limitation remains unresolved?

If one artifact changes, how will we identify the affected reference in the other?

Which specialist question is outside your scope, and who coordinates that handoff?

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Fundraising preparation handoff / 03

CHECK THE PREPARATION BOUNDARIES

Tick what has been discussed. This organizer does not validate information or authorize an offering or distribution.

- [ ] Questions have neutral labels
- [ ] Model and presentation outputs are separately identified
- [ ] Underlying information has an owner role
- [ ] Unanswered questions remain visible
- [ ] Period, scope and version differences are questions, not conclusions
- [ ] Revisions identify affected references in both artifacts
- [ ] Specialist handoffs have a receiving role
- [ ] Review receipt is separate from sharing authorization

Question label / model reference / presentation reference / difference to explain

CFO explanation reference / remaining limitation / responding role

Specialist question / agreed receiving role / handoff reference

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Fundraising preparation handoff / 04

FOLLOW A REVISION THROUGH BOTH ARTIFACTS

Track the explanation and handoff, not fundraising decisions. A received revision is not approval to circulate it.

Question A / earlier model and presentation references / revision question

A: proposed revised model reference / revised presentation reference / responding role

A: explanation or specialist reply reference / remaining question

Question B / earlier model and presentation references / revision question

B: proposed revised model reference / revised presentation reference / responding role

Review-receipt reference / unresolved question / separate sharing decision left to advisers

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Fundraising preparation handoff / 05

COMPARE THE CFO PREPARATION SCOPE

Use Provider A/B in each box. Compare coordination and explanations, not investment strategy or funding promises.

Provider A / B / same question labels and artifact references / proposal references

Model and presentation deliverables, input roles and explanation meetings - A / B

Revision connections, specialist coordination, handoff records and exclusions - A / B

Timing, fee basis, written terms, follow-up and unresolved scope questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai if you choose, then start a Fractional CFO request. Describe the model-and-presentation coordination support you want without private financial details, and let participating pros compete with proposals. Compare deliverables, explanations, specialist handoffs, revisions, timing and terms. A private engagement discussion may be needed.

One request. Every pro's best offer.

Start a request

Participation varies. A private engagement discussion may be needed before confirming preparation scope.

Planning guide: https://www.pickyourpro.ai/services/fractional-cfo/fundraising-preparation

SEC: Resources for Small Businesses (official reference)

SEC: Capital-Raising Building Blocks (official reference)

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