

Pre-seed fundraising checklist

The documents, metrics and narrative pieces to have ready before you start a pre-seed process.

Overview

A pre-seed process runs faster when nothing has to be built mid-conversation. Assemble this before the first meeting, not after the first request.

Corporate

- Certificate of incorporation, MoA and AoA.
- Current cap table including SAFEs, notes and ESOP pool.
- Founder agreements with vesting and IP assignment in place.
- Board and shareholder resolutions passed to date.
- PAN, TAN, GST registration and, where relevant, DPIIT recognition.

Financial

- Bank statements for the last 12 months.
- Monthly P&L, even if unaudited.
- Burn rate and runway, stated as a date rather than a number of months.
- An 18–24 month model with assumptions on a separate tab.
- GST and TDS filing status, with any pending items disclosed.

Commercial

- Customer or user list with signup date, revenue and status.
- Retention or repeat-usage data by cohort.
- Signed customer contracts or letters of intent.
- Pricing sheet and discount policy.

Narrative

- 12-slide deck and a one-page summary.
- A 90-second verbal version of the same story.
- Written answers to the five hardest questions about the business.

- A target list of 40–60 investors, sorted by stage and sector fit.

How to run the process

Approach investors in batches of ten to fifteen so that feedback from the first batch can improve the story before the rest see it. Track every conversation with date, stage and next step. A pre-seed round typically takes eight to sixteen weeks from first meeting to money in the bank; plan runway accordingly.

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