



WILKES UNIVERSITY

**Venture Concept** *Describe concept and commercialization strategy*

**Background** *Describe what led to creation of the company*

**Company Team** *Briefly list key team, roles, and experience*

**Technology** *Describe key technology differentiating company from its competition*

**Targeted Markets** *Describe entire market as well as segment(s) company will capture*

**Competition** *List key competitors, direct (or indirect if appl.)*

**Product Line** *Briefly detail product strategy*

**Commercialization** *Describe how company will reach its market segment(s) and when*

**Forecast Results** *Double click cells to open spreadsheet; click outside cells to close*

**Achievements To-Date** *Briefly describe key accomplishments and milestones met*

**Founder Funding To-Date**

**Non-Founder Funding To-Date**

**Financial Req'ts. and Deal Structure** *List funds required, pre-funding valuation & terms*

**Investor Exit Plan** *Describe plans for returns on investments*

**Uses of Financial Proceeds**

**Outside Advisors** *List names and firms*

## Sample Early Stage Firm Client Profile