

Powering ideas with investment.

Ready to raise funds? Here's a handy guide
to get you started.



A step by step guide to raising capital.

1. Clarify your funding needs.

Work out how much capital you think you need and get clear on what it's for.

Ask yourself:

- What outcomes do you hope this capital will achieve?
- How will it generate future revenue or stability?
- What is the timeline and return potential?

If you're stuck at this step - a great adviser can help you workout how much capital you need.

2. Get your coins in a row

Ensure you have the business and financial documentation you need ready to go.

This often includes things like:

- A clear profit and loss statement
- Cash flow forecasts
- Balance sheet
- Financial projections

Your accountant or adviser can tell you what you already have, what's missing, and what needs cleaning up.

3. Explore funding options.

The best funding option for you will depend on your business stage, sector and strategy.

Some common funding types include:

- Angel investors: high net worth individuals who invest early and offer mentorship.
- Venture Capital: firms who invest pooled money into fast growing businesses.
- Private Equity: firms who invest in established companies, taking ownership stakes to drive growth.

4. Get to work on your pitch.

Your moment to shine has arrived! Now is the time to wow potential investors.

Tips for nailing your pitch:

- Tell your story - your why, your team and hero customer stories.
- Know the opportunity - talk to the market potential and your competitive advantage.
- Know your numbers - things like your revenue model, margins and projections.
- Ask! How much are you raising, how will it be used and what's the impact?

5. Start negotiations

After a successful pitch meeting, expect to meet again (and again).

Typically these meetings include:

- A deep dive into your business model.
- Requests for documentation - a process known as due diligence.
- Outlining an investor exit strategy (if relevant to your type of funding)

This negotiation phase isn't just about securing funding, it's about determining if you're the right fit.

Keen to learn more about raising capital?

Get in touch with us 