

Tools of the Trade: Introducing the Seraf Toolbox for Early Stage Investors

The handyman's toolbox... whether you use it for small home improvement projects or just minor repairs, no home is complete without a few essential tools. At [Seraf](#), we feel the same way when it comes to investing in early stage companies. You need a good set of tools to do the job right.



Sometimes the task at hand is overseeing due diligence on a potential investment. Other times, you need to advise a CEO on how to run a great board meeting. Or maybe you need some guidance on where to look for key data in the investment documents you receive from company counsel. Whatever the task is, we want you to have the right tools to get the job done, so we've collected a great set of early-stage company checklists and templates for everyone to use as a reference. Bookmark it, link to it, share it and keep your eye on it - we'll add additional handy tools every so often.

Tools for Board Directors

Based on our [Director's Guidebook](#), we created two very important tools that will help you improve investor and board communications with a company CEO. These tools are designed to help you stay informed and ensure that you have the information you need to help your portfolio companies succeed.

- [Guidelines for Successful Board Meetings and Investor Reports with Early Stage Companies](#)
- [Sample Board Meeting Dashboards for Early Stage Companies](#)

Tools for Conducting Due Diligence

From our [Investor's Guide to Due Diligence](#), we created four early-stage checklists / templates that will help you manage an efficient due diligence process and gather the right information to help investors make informed investing decisions. Due diligence can be a complex, frustrating project. These tools are designed to help you get the job done in a timely, efficient manner.

- [Due Diligence Checklist](#)
- [Questionnaire for Assessing Management Teams](#)
- [Questionnaire for Checking Customer References](#)
- [Template for Due Diligence Reports](#)

Tools for Navigating Deal Terms and Investment Documents

As a companion to our [Guide for Understanding Early-Stage Deal Terms](#), we created a tool to help you navigate complex legal documents. This tool outlines what key terms mean, why these terms are important to investors, and where you will find them in your investment documents.

- [What You Need and Where You Will Find Key Data to Track Your Early Stage Investments](#)

So bookmark these links and find out how our tools can help make your early stage investing more productive. We encourage you to share them with your colleagues and post them on your own sites as well. We plan on adding new tools to the Seraf toolbox over time, so check back frequently, or [subscribe to The Seraf Compass](#) to get them automatically delivered to your email inbox. You never know when your latest project for an early stage investment might benefit from one of our latest and greatest tools! If you know of another great tool we should include in this toolbox, tweet us at [@serafinvestor](#) and let us know!



Portfolio Management for Groups, Funds and Angels

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Smart investing.*

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- Streamline reporting and improve workflow
- Make better investing decisions and drive returns
- Store investment documents in one place for easy access
- Have peace of mind knowing all your records are organized for successors
- Free to Angel Groups for their aggregate portfolio

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The Seraf Compass



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