A QUICK PRIVATE-CAPITAL REVIEW

Private Capital Control Check

Use this before a new deal, raise, partnership, or major money decision. Mark each item Clear, Needs work, or Not sure. Do not write account numbers, tax IDs, passwords, or other confidential data on this worksheet.

1 Ownership

Can you name what you own, how it is held, and who else has a claim?

□ Clear □ Needs work □ Not sure

2 Control

Is it clear who can sign, approve, move money, and make the final call?

□ Clear □ Needs work □ Not sure

3 Money map

Can you see what cash is available, committed, restricted, or expected?

□ Clear □ Needs work □ Not sure

4 Records

Are signed documents, approvals, reports, and key dates easy to find?

□ Clear □ Needs work □ Not sure

5 Filings

Are required entity, tax, securities, and state filings current and tracked?

□ Clear □ Needs work □ Not sure

6 Advisers

Do the right people have clear roles, limits, deadlines, and one source of truth?

□ Clear □ Needs work □ Not sure

What is already clear?

For planning and education only. This is not legal, tax, accounting, investment, or financial advice.

DECIDE WHAT NEEDS ATTENTION NEXT

Control gets stronger when the next move is clear.

Finish the review, then choose the three items that deserve attention in the next 12 weeks. A short list that gets done is stronger than a long list that sits still.

7 Deal review

Does every opportunity have a clear owner, price, downside, and decision date?

□ Clear □ Needs work □ Not sure

8 Open risks

Can you name the three issues most likely to cost money, time, or control?

□ Clear □ Needs work □ Not sure

9 People and access

Do you know who gets information, authority, introductions, and a seat at the table?

□ Clear □ Needs work □ Not sure

10 Investor process

If you raise money, are suitability, communication, funding, and records handled the same way every time?

□ Clear □ Needs work □ Not sure

11 Decision rules

Do you know what must be true before you say yes, wait, renegotiate, or walk away?

□ Clear □ Needs work □ Not sure

12 Next 12 weeks

Are the top three outcomes, owners, and deadlines written down and reviewed?

□ Clear □ Needs work □ Not sure

My three priorities for the next 12 weeks

_____

_____

_____

One decision I will stop delaying

_____