

Startup Data Room Template

Folder structure and checklist for your funding round

Updated October 2026

How to use this template

Investors review a startup data room by area: legal, ownership, financials, product, customers, team and risk. This template gives you the folder structure to mirror that order and a checklist of what to put in each folder. Create the same folders in your virtual data room, upload your documents, and tick each item when it is current and in the right place.

Use a two-level hierarchy: one top-level folder per category and one level of subfolders. Number the folders so they sort in the order investors read them.

1. Folder structure at a glance

Folder	Subfolders	Why investors look
00 Overview	Summary; Index	A map of the room and a strong first impression
01 Company and legal	Incorporation; Governance; Litigation	Confirms the company is legally sound and ownership is clear
02 Cap table and funding	Cap table; Instruments; Investor rights	Shows who owns what and which rights already exist
03 Financials and metrics	Statements; KPIs; Forecast	Tests financial control and your traction claims
04 Product, technology and IP	Product; IP; Technology	Verifies that you own what you build
05 Customers and traction	Customers; Pipeline; Contracts	Validates demand and revenue quality
06 Team and HR	Org chart; Agreements; Equity plans	Reveals key-person risk and equity commitments
07 Security and compliance	Policies; Risk	Shows you are ready for serious diligence

2. Checklist by folder

Tick each item when the document is current, final and stored in only one place.

00 Overview	
☐	Company overview and key facts
☐	First-meeting pack (see section 3)
☐	Data room index

01 Company and legal

- ☐ Incorporation documents
- ☐ Shareholder agreements
- ☐ Board consents
- ☐ Ongoing or past litigation summary

02 Cap table and funding

- ☐ Current cap table
- ☐ SAFEs and convertible notes
- ☐ Key investor rights
- ☐ Prior funding summary

03 Financials and metrics

- ☐ Profit and loss (P&L) statement
- ☐ Burn rate and runway
- ☐ Revenue breakdown
- ☐ Key performance indicators (KPIs)
- ☐ Financial model

04 Product, technology and IP

- ☐ Product deck and roadmap
- ☐ IP assignments (founders, employees, contractors)
- ☐ Open-source policy
- ☐ Vendor dependencies

05 Customers and traction

- ☐ Key customers
- ☐ Pipeline summary
- ☐ Retention and churn metrics
- ☐ Contracts and master services agreements (MSAs)

06 Team and HR

- ☐ Org chart
- ☐ Employment agreements
- ☐ Option plans and equity incentives

07 Security and compliance

- ☐ Security policies
- ☐ Access controls
- ☐ Incident history
- ☐ SOC / ISO posture (if applicable)

3. Minimum “first-meeting” pack

Before your first serious investor meeting, these items let investors start diligence quickly.

- ☐ Company overview and key facts
- ☐ Ownership summary and cap table
- ☐ Early financials, including revenue, burn and runway
- ☐ Key traction metrics and milestones
- ☐ Product overview and roadmap
- ☐ Summary of intellectual property and patents
- ☐ Major customer and partner highlights
- ☐ Basic operational policies and security measures
- ☐ Key team members and organisational chart
- ☐ Option plans and equity incentives
- ☐ Significant agreements, including contracts and MSAs
- ☐ Early investor rights and prior funding summary

4. Naming and version rules

Name files clearly	Use descriptive names with a date and, where needed, a version number.
Examples	CapTable_2026_03.xlsx · ProductRoadmap_Q2_2026_v2.pdf · P&L_2025_FY_final.pdf
One source of truth	Keep each document in one place only. Remove copies from shared drives and other folders.
Keep it shallow	One top-level folder per category and one level of subfolders. Avoid paths such as 2025 → Q1 → Drafts → Final.

5. Before you share the room

- ☐ A named owner is responsible for updates and a regular update cadence is agreed
- ☐ Folders follow the structure above, with no deep nesting
- ☐ Cap table matches the legal documents and the working model
- ☐ Financial figures and KPIs are current
- ☐ IP assignments are signed by founders, employees and contractors
- ☐ Access is set by investor group, with download and print rights only where needed
- ☐ Sensitive financials and contracts are shared only once an investor is serious

This template is a general guide for organising a startup data room. Requirements vary by stage, industry, jurisdiction and investor, so consult legal and financial advisers to confirm that your materials are complete.