Helpful documents / information if available before meeting with the team

1. Past board meeting packages
   1. What was presented to the board over a period of time
   2. How frequent have board meetings occurred

1. Investor Presentations
   1. Current (or closest to current)
   2. Past
2. Capitalization
   1. Current capitalization table
   2. Description of Preferences
   3. Known or suspected future capital requirements
3. Budget / Financials
   1. Waterfall version if available, fine with multiple versions
   2. Detail, not just summary
   3. Salary by position if not in the detailed budget

1. Customer Funnel (how is this tracked?)
   1. Definition of stages
   2. Actual list of customers (by stage)

1. Product Specifications
   1. Product briefs
   2. Product specifications
   3. User guides
2. Performance / Competitive Data
   1. Competitive analysis / other approaches
   2. Performance methodologies

1. Organizational Chart
   1. Title
   2. Name
2. Patents / IP protection of other types
   1. List of patents
   2. Trademarks, et al