

Funding Readiness Checklist

Make sure you are ready before you apply for a loan, grant or investment.

Funders look for clear plans, reliable numbers and a credible team. Tick every item before you apply, and you will be far more likely to succeed.

1 Know what you need

- ☐ Exact amount of funding needed
- ☐ What the money will be used for, item by item
- ☐ The right type of funding (loan, grant, equity, crowdfunding)
- ☐ Eligibility criteria for each funder on your list

2 Documents

- ☐ Up-to-date business plan
- ☐ Financial forecasts and cash-flow
- ☐ Recent financial statements or bank statements
- ☐ Business registration and licences
- ☐ Personal and business credit history checked
- ☐ CVs of the management team

3 Your pitch

- ☐ A one-page summary
- ☐ A 10–15 slide pitch deck (for investors)
- ☐ Clear answers to: why you, why now, how you repay or grow
- ☐ Evidence of traction (customers, sales, letters of support)

4 Application

- ☐ Read the funder's guidance twice
- ☐ Answer every question directly, using their scoring criteria

- ☐ Have someone review your application
- ☐ Submit before the deadline and keep copies

My notes

Want expert help with this?

- Funding & Investor Readiness: pitch deck, coaching and applications
- Grant & Proposal Writing
- Feasibility Study and Business Plan for lenders



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