

[Corporate Logo]
**NOTE – match background
& text colors to company
colors, as found on website**

Company Overview

**Presentation To
XYZ Investment Bank**

Month, Year

Table of Contents

[Corporate Logo]

- ◆ **Mission Statement**
- ◆ **Management Team**
- ◆ **Industry/Business Overview**
- ◆ **Benefits of Partnership**
- ◆ **Next Steps**

Mission Statement

[Corporate Logo]

- [Mission Statement]

Business Description

[Corporate Logo]

- [Describe what the company does. This should be a broad cross section of the company's capabilities.]

Management Team

[Corporate Logo]

Manager 1, Title

- [info]
- [info]

Manager 2, Title

- [Info]
- [Info]

Management Team

[Corporate Logo]

Manager 3, Title

- [Info]
- [Info]

Manager 4, Title

- [Info]
- [Info]

Industry Overview

[Corporate Logo]

[This slide should be written in terms of industry wide problems and solutions that Arsenal brings; the analysts want to see it written as benefits, not features.]

- [Explain market opportunity]
- [Further description of market]
- [What is going on in the industry]
- [What is going on in your specific market segment]
- [Size of market]
- [Historical market growth/expansion]
- [Market growth projections]

Business Overview

[Corporate Logo]

[This is what Arsenal can do. The “world” has problems; this is how Arsenal will solve them.]

- [What does the company do?]
- [What market(s) is the company in?]
- [Describe service/product]
- [Revenue model]

Key Metrics

[Metrics that drive company valuation]

Industry Metrics

[Comparables]

Customers

[customers]

Strategic Alliances

[Corporate Logo]

- [Has the company partnered with anyone?]
- [Details of any partnership:]
 - [Why was it completed?]
 - [What value does the partnership add?]
- [Potential alliances considered (not name specific)]
- [Potential acquisitions considered (not name specific)]

XXX Technology

[Corporate Logo]

- [Explanation of technology and its traction]
- [Write in terms of benefits.]

[graphical diagram of technology or proprietary features]

Competitor Analysis

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- [What is the competitive landscape in the market?]
- [Delineate competitors by segment]
- [How attached are customers to specific competitors?]
- [Are there competitive barriers to entry?]
- [Competition matrix]

Key competitive advantages

- [advantages]

	• [Info]	• [Info]
Label	• [Info]	• [Info]

Threats

[Title]

[Corporate Logo]

- **Competitive threats**
- **Industry threats**
- **Technology threats**
- **Price pressures**
 - **Example: Free bandwidth, storage**

Success Models

[Title]

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- [Details of success story]

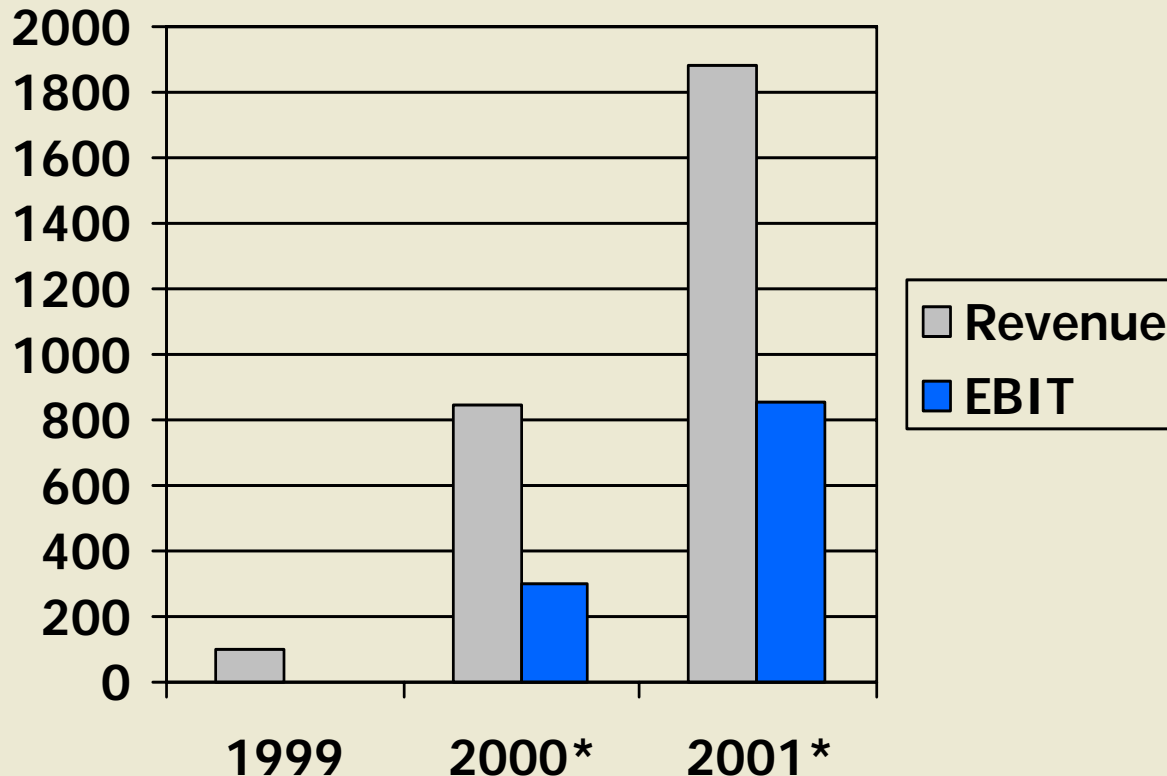
Milestones Achieved

[Facts and details of success]

Operating Performance

[Corporate Logo]

- [ancillary details]



* - Projected

Key financials

- [Revenue, projections]
- [Include general financials (e.g., revenues, cost of sales, gross profit, operating expenses, employees) and figures most specific to your industry (e.g., traffic, unique visitors, market share)]

Use of Funds

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[Avoid stating that funds will be used for working capital deficits]

- [Organic business growth]
 - [Invest in infrastructure]
- Acquisition of customers
- European roll out
- Latin American roll out
- Asian roll out

Company Objectives

[Corporate Logo]

Strategic

- [Expand bank IPO profile]
- [Fit with bank IPO deal flow]

1-3 months

Strategic round of \$25-\$50 million
S-1 Filing
Hire Chief Technology Officer
Complete new Board of Directors
Other

Financial

- [Potential equity stake]
- [IPO valuation and fees]

Company Objectives

[Corporate Logo]

Strategic

- [Expand bank IPO profile]
- [Fit with bank IPO deal flow]

Next 2 – 4 Quarters

Financial

- [Potential equity stake]
- [IPO valuation and fees]

Initial Public Offering

European roll-out

Positive cash flow

Latin American roll-out

Acquisition of customers

Other

Company Financial Objectives

[Corporate Logo]

Strategic

- [Expand bank IPO profile]
- [Fit with bank IPO deal flow]

1 Year Plus

Financial

- [Potential equity stake]
- [IPO valuation and fees]

Leverage equity with prudent debt level
Another public offering
Earnings distribution

Partnership With Arsenal

[Corporate Logo]

Long-term

- [Lead strategic round]
- [Lead IPO]
- [Lead subsequent offerings]
- [Provide financial advice]
- [Coordinate new business opportunities]

Benefit

- [Long-term relationship with well managed company]
- [Storage utility winner versus Goldman Sachs]
- [Additional investment opportunity]