

Document Preview – This is only a portion of the entire, customizable document.

Investor	Contact	Communication Status	Next Step	Company Contact Owner	Likely Investment
Hot					
1 Name	XYZ Capital	Phone call 10/27	Call week of 11/13	Name	
2 Name	Individual Investor	Email 10/18	Mtg Week of 11/6	Name	-
3 Name	Individual Investor	Email 10/18	Mtg Week of 11/6	Name	
4 Name	Individual Investor	Email 10/18	Mtg Week of 11/6	Name	
5 Name	Individual Investor	Email 10/18	Mtg Week of 11/6	Name	-
6 Name	Individual Investor	PP & ES Sent 10/30; Aaron to call 10/30	Try to Meet week of 10/30	Name	
7 Name	Individual Investor	Presentation	Call 10/30	Name	
8 Name	Individual Investor	Presentation	Call 10/30	Name	
9 Name	Individual Investor	Pitched 10/23	Follow up 10/30	Name	
10 Name	Individual Investor	Sent e-mail 8/2	Pending Mike Creamer	Name	-
11 Name	Individual Investor	Phil email 10/17	He will call us week of 10/30	Name	-
Warm					
1 Name	Individual Investor	EM 8/10	Hold- Us	Name	\$ -
2 Name	Individual Investor	Old presentation	Hold- Us	Name	-
3 Name	Individual Investor	9/10: Sent Exec.Summ	Hold for new Bus. Plan	Name	-
4 Name	Individual Investor	EM 8/8	Call 8/16	Name	50,000
5 Name	Individual Investor	None	Hold- For MJ	Name	
6 Name	Individual Investor		Will approach after partnership	Name	50,000
7 Name	Individual Investor	Email 10/4	Continue Disuss. As product evolves.	Name	
8 Name	Individual Investor	Email 10/4	He is coord. A group. Will call us.	Name	
9 Name	Individual Investor	Sent e-mail and won't be back until 8/20	Email week of 10/16	Name	-
10 Name	Individual Investor	Sent e-mail 8/2	Email week of 10/16	Name	-
11 Name	Individual Investor	Sent e-mail 8/2	Email week of 10/16	Name	-
12 Name	Individual Investor	Sent e-mail 8/2	Email week of 10/16	Name	-
13 Name	Individual Investor	Email 8/15	10/18	Name	-

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Investor	Contact	Communication Status	Next Step	Company Contact Owner	Likely Investment
14 Name	Individual Investor	Email 8/15	Email week of 10/16	Name	-

Sample Preview