



Phundex Pathway Templates – Investment Committee Meeting Preparation

We've been talking to our clients about the Board Meeting Preparation Pathway. A number of them asked if they could also use it to manage their Investment Committee meetings as well. We said it would be simple to create a Board meeting Pathway and amend it for Investment Committee Purposes.

We've helped run Investment Committees for clients in the past, so we decided to create a new Pathway template specifically for Investment Committee meetings. We even helped a client create an investment opportunity executive summary, so we've included an investment opportunity executive summary to make it easier for the opportunities to be reviewed. You'll also find the usual templates for Agenda, Minutes, and Action Trackers

Having a structured process for preparing for Investment Committee Meetings makes it much easier to ensure you have all of the information required for the Committee to make its decisions the first time the opportunity is presented, saving time and allowing you to get to market sooner.

Our Pathway Template takes you through the various steps to gather the materials for the Investment Committee, including a checklist of topics to cover, and an Investment Opportunity Summary Template to provide a standardized summary for all opportunities. Once you've tailored the Investment Committee Meeting Pathway to meet your requirements, you can set it as one of "My templates", and replicate it for every Investment Committee meeting, providing transparency, a standardized process, and a clear governance structure.

Want to know more? Checkout our resources page at <https://phundex.com/resources/>, drop us an email at: hello@phundex.com, or check out our website chat button. To book a demo – you can either use the link on our website or email support@phundex.com and they will be happy to set it up for you.