



CPVS™
SAMPLE
FORM



Capital Planning Valuation Strategy (TM) Worksheet Form

Please upload documents for Medical Funding Professionals to review. Note that file sizes are limited to 20MB each. If you are having trouble uploading files, please email me at stephen.brock@medicalfundingpro.com.

Name *

First Last

Company *

Email *

Phone *

How much capital are you seeking? *

- 1mil-5mil
- 5mil-15mil
- 15mil-40mil
- 40mil-75mil
- 75mil+

Last pitch deck or current

Your Notes Last pitch deck or current

Please insert your notes as it relates to last pitch deck or current

Last pitch deck or current

Choose File(s)

Capitalization table including any proformas planned out

Your Notes Capitalization table including any proformas planned out

Please insert your notes as it relates to capitalization table including any proformas planned out

Capitalization table including any proformas planned out

Choose File(s)



Business plan-most recent - only if available

Your Notes Business plan-most recent

Text input area for notes related to the business plan-most recent.

Please insert your notes as it relates to business plan-most recent (only if available).

Business plan-most recent

Choose File(s)



Any stock option programs

Your Notes Any stock option programs

Text input area for notes related to any stock option programs.

Please insert your notes as it relates to any stock option programs

Any stock option programs

Choose File(s)



Your convertible notes/or note if they exist

Your Notes Your convertible notes/or note if they exist

Text input area for notes related to convertible notes/or note if they exist.

Please insert your notes as it relates to your convertible notes/or note if they still exist

Your convertible notes/or note if they exist

Choose File(s)



Previous term sheets

Your Notes Previous term sheets

Please insert your notes as it relates to previous term sheets

Previous term sheets

Choose File(s)

Income Statements past two years

Your Income Statements past two years

Please insert your notes as it relates to P&L

Current Balance Sheet

Current Balance Sheet

Please insert your notes as it relates to P&L

Current Balance Sheet

Choose File(s)

List of patents

Your Notes List of patents

Please insert your notes as it relates to list of patents

List of patents

Choose File(s)

Corp status name as registered at SOS of state registered

Your Notes Corp status name as registered at SOS of state registered

Please insert your notes as it relates to Corp status name as registered at SOS of state registered

Corp status name as registered at SOS of state registered

Choose File(s)



Projections for cash flow - only if available

Your Notes Projections for cash flow if done yet

Please insert your notes as it relates to projections for cash (only if available).

Projections for cash flow if done yet

Choose File(s)



Loans balance and rate

Your Notes Loans balance and rate

Please insert your notes as it relates to loans balance and rate

Loans balance and rate

Choose File(s)




Other Files

Your Notes on other files submitted

Please insert your notes as it relates to other files uploaded

Other Files

Choose File(s) 

Please upload any other files you deem beneficial

[Review](#) [Save For Later](#) [Submit](#)

**Want to upload documents for Medical
Funding Professionals to review?**

[View Online Form](#)