

WHICH PACKAGE IS RIGHT FOR YOU?

READY TO HELP YOU GROW



As a Cofounders Capital portfolio company, you are eligible for the following discounted packages for the first 2 years.

SEED PACKAGE \$500/MONTH

- Business tax returns (1 state)
- R&D tax credit preparation
- Initial QuickBooks setup and consultation
- Monthly consultation of up to 1.5 hours to discuss financial statements to submit to Board
- Sales and use tax consultation

VENTURE PACKAGE \$750/MONTH

- Business tax returns (2 states)
- R&D tax credit preparation
- Initial QuickBooks setup and consultation
- Monthly consultation of up to 3 hours to discuss financial statements to submit to Board
- Sales and use tax consultation

OPTIONAL SERVICES

- R&D tax credit maximization solution
- Outsourced equity accounting including stock options, warrants and safe harbor 409A valuation(s)
- Sales tax consulting
- Due diligence consulting
- Exit planning
- International tax consulting
- Revenue recognition consulting
- IPO readiness
- Internal controls consulting



HPG

looking beyond the bottom line.™

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01 SEED CAPITAL

- Business Idea
- Corporate Structure (LLC vs. Corporation)
- Market Research
- Develop Initial Product Plan or Alpha Product
- Start-Up Competitions
- Raise Seed Capital

02 ANGEL CAPITAL

- University License
- Develop Beta Product or Prototype
- Beta Product Launch & Feedback
- Identify Milestones
- Develop Forecast
- Develop Financial Plan
- Raise Series A Financing

03 SERIES A PREFERRED

- Milestone Focus
- Product Launch
- Cash Flow
- Net Losses
- Go-to-Market Strategy
- Fractional CFO
- Raise Debt for Capital Needs and Working Capital Sales Team
- Sales Team
- Strategic Partnership & Channel Development
- Recruit & Hire Talent
- 409A Valuation
- Formal Board Structure
- Corporate Governance
- Sales Tax Compliance
- Intellectual Property (IP) Protection
- Forecast, Milestone, and Financing Plan Update
- Bridge Convertible Notes
- Raise Series B Financing

06 IPO/SALE EXIT

- Focus on Scale
- Expand Board with Outsiders
- Full-Time CFO
- Adding the Right Investor for M&A or IPO
- Improving Your Products
- Expanding Market Development
- International Tax Structure and Compliance
- Acquiring New Customers
- Figure Out Your Distribution Strategy
- Connect With Potential Strategic Partners with Valuable Relationships (with potential clients)

THE LIFE CYCLE OF A START-UP

Although each company is unique, most start-ups follow a similar trajectory. The life cycle outlined below can help guide you through the stages of growth.

04 SERIES B PREFERRED

- Monthly & Quarterly Milestone Focus
- Focus on Operations
- Focus of Breakeven Point
- Go-to-Market Strategy Updated
- Talent Acquisition and Development Plan
- International Launch Evaluation
- IP Protection Plan Update
- Forecast, Milestone, and Financing Plan Update
- Bridge Convertible Notes
- Raise Series C Financing

05 SERIES C PREFERRED

- Investment Bankers
- IPO Readiness
- One Year Out-Plan
- Audit Preparation (PCAOB)
- Valuation
- Compensation Consultant
- Mezzanine Financing
- Identify Strategic Buyers and A Successful Exit

