

THE CREST MARK

Navigating Business Success, One Milestone at a Time

YOUR LUXURY INVESTMENT

Funding & Investor Relations Implementation Guide

Hey there! Ready to turn those funding insights into action? I've put together this workbook to help you navigate the journey from concept to funded luxury brand. Let's break this down into manageable steps that'll set you up for success.



MONTHLY GROWTH TRACKER

Investment Readiness Checklist

	Tasks	Target Date	Status	Notes
Business Structure Optimization	<input type="checkbox"/> Review current business structure	/ /		
	<input type="checkbox"/> Map IP holdings and protection			
	<input type="checkbox"/> Outline international expansion framework			
	<input type="checkbox"/> Create investment vehicle structure			
Growth Strategy Development	<input type="checkbox"/> Define brand equity milestones	/ /		
	<input type="checkbox"/> Create exclusivity management plan			
	<input type="checkbox"/> Build heritage development timeline			
	<input type="checkbox"/> Design innovation roadmap			
Investor Materials	<input type="checkbox"/> Craft luxury-focused pitch deck	/ /		
	<input type="checkbox"/> Develop financial projections			
	<input type="checkbox"/> Create brand heritage story			
	<input type="checkbox"/> Build investor presentation kit			
Network Building	<input type="checkbox"/> Identify potential investors	/ /		
	<input type="checkbox"/> Map luxury investment networks			
	<input type="checkbox"/> Create relationship nurture plan			
	<input type="checkbox"/> Build advisory board			

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QUICK WINS TRACKER

This week, focus on these three momentum-builders:

- **Brand Story Development**
 - Spend 45 minutes writing your heritage vision
 - Map out 5-year brand evolution plan
 - Identify key milestones Time needed: 2-3 hours Expected outcome: Clear brand evolution narrative
- **Financial Framework**
 - Review current financial structure
 - Identify gaps in reporting
 - Create luxury-specific metrics Time needed: 4-5 hours Expected outcome: Investment-ready financial framework
- **Network Building Sprint**
 - List 20 potential investors
 - Research their luxury portfolio
 - Draft personalized outreach Time needed: 3-4 hours Expected outcome: Initial investor outreach plan

Note :

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FUNDING & INVESTOR RELATIONS IMPLEMENTATION GUIDE



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1. INVESTMENT READINESS SCORECARD

Business Structure Assessment:

Element	Current State	Target State	Gap	Action Items
Legal Structure				
IP Protection				
International Framework				
Investment Vehicle				

 Note :



Brand Value Metrics :

Indicator	Current	12-Month Target	Action Items
Brand Recognition			
Client Lifetime Value			
Market Position			

 Note :



2. INVESTOR MATCHING MATRIX

Investor Profiler Mapping:


Investor Type	Focus Area	Investment Range	Alignment Score
			___ / 10
			___ / 10
			___ / 10

 Note :



Target List:

Investor	Portfolio Fit	Contact Strategy	Status

 Note :



2. INVESTOR MATCHING MATRIX

Brand Evolution Stages:


Phase	Timeline	Key Milestones	Investment Needs
Foundation			_____/-
Growth			_____/-
Scale			_____/-

 Note :



Value Creation Markets:

Element	Current Value	Target Value	Strategy
Brand Equity			
Market Share			
Innovation Pipeline			

 Note :





RESOURCE TOOLKIT

- **Legal & Structure Templates**
 - Business structure assessment guide
 - IP audit checklist
 - Investment vehicle formation guide
 - International expansion framework
- **Pitch Development Tools**
 - Luxury pitch deck template
 - Financial projection models
 - Brand story framework
 - Heritage timeline template
- **Investor Relations Resources**
 - Investor meeting scripts
 - Due diligence checklist
 - Term sheet review guide
 - Negotiation strategy framework



MONTHLY REFLECTION

- **Take a moment to consider:**
 - What surprised you most about luxury investment?
 - Which aspects of your business need the most work?
 - What's your biggest win so far?
 - Where do you need the most support?



Note :



 **LOOKING AHEAD**

- **Next month's focus areas:**
 - International market entry
 - Cross-border operations
 - Global brand positioning
 - Cultural adaptation strategies

 **Note :**

 **COMMUNITY CORNER**

- **Share your funding journey!**
 - Post your progress using #CrestMarkFunding
 - Join our weekly pitch practice sessions
 - Connect with funded founders
 - Share your learnings

Remember, securing investment for a luxury brand isn't just about the numbers - it's about finding partners who believe in your vision of excellence. Take your time with these exercises, and don't hesitate to reach out in our community if you need help!

See you in our next strategy session!

Best, The Crest Mark Team

P.S. Don't forget to register for our upcoming masterclass: "Negotiating with Luxury Investors" - you'll learn invaluable strategies for your funding journey!

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