



Toolkit 1.0 – Onboarding + Funding Enablement

Purpose: Capture foundational details, organize vision, and structure funding strategy.

Section 1: Vision & Identity

- **Project Name:** _____
- **Founder(s):** _____
- **Mission Statement:**

- **What problem are you solving?**

- **Target Audience (Demographics/Psychographics):**

- **Top 3 Goals for the Next 90 Days:**

1. _____
2. _____
3. _____

Section 2: Assets & Resources

- **Do you have a website?** ☐ Yes ☐ No

If yes, URL: _____

- **Do you have branding elements?** ☐ Logo ☐ Fonts ☐ Colors ☐ None
- **Socials (Check all that apply):**

☐ Instagram @_____ ☐ TikTok @_____

☐ X (Twitter) @_____ ☐ YouTube @_____

- **Team/Collaborators:**

Section 3: Budget & Funding Plan

- **Estimated Startup Budget Needed:** \$_____
- **Capital in Hand:** \$_____
- **Are you seeking outside funding?** ☐ Yes ☐ No
- **Preferred Funding Route(s):**

☐ Personal Capital

☐ Friends & Family

☐ GoFundMe / Crowdfunding

☐ Grants

☐ Investors / Pitch Deck

☐ Business Credit / Loans

- **Grant or Loan Deadlines (if known):**

- **Upload/Link Pitch Deck or Budget Spreadsheet (Optional):**
