Here’s the full set of **investment banking client meeting types mapped to the deal lifecycle**, formatted as a single table:

| **Deal Stage** | **Meeting Type** | **Description** |
| --- | --- | --- |
| **Kickoff & Strategy** | Kickoff / Engagement Meeting | Initial discussion with management/board to define objectives, scope, and next steps for the transaction. |
|  | Strategic Alternatives Review | Exploratory session presenting potential paths: IPO, M&A, recapitalization, or spin-off. |
|  | M&A Pitch Meeting | Presentation of acquisition, merger, or divestiture ideas, supported by comps, synergies, and structures. |
|  | IPO Kickoff Meeting | Detailed walkthrough of IPO process, timeline, valuation ranges, regulatory filing strategy, and role allocation. |
|  | Debt Financing Discussion | Early review of potential bond or loan issuance, including market appetite, structure, and covenant considerations. |
|  | LBO Discussion | Scenario analysis with PE or corporates on leverage capacity, financing sources, and return profiles. |
| **Due Diligence & Analysis** | Due Diligence Meeting | Detailed review of financials, operations, risks, and data room walkthroughs. |
|  | Management Q&A Session | Client executives field detailed diligence questions from bankers, investors, or counterparties. |
|  | Valuation & Terms Review | Session to align with client on preliminary valuation, structure, and financing scenarios. |
|  | Internal Commitment Committee Meeting | Internal approval discussions within the bank for underwriting capital or risk limits before presenting to the client. |
| **Marketing & Investor Engagement** | Investor Education Prep | Coaching client executives on messaging, presentation flow, and handling Q&A. |
|  | Analyst / Investor Teach-Ins | Deep dives for investors on company strategy, financials, and sector outlook (common for IPOs). |
|  | Roadshow Meetings | Bankers and client executives meet investors to present the transaction and test demand. |
|  | Investor One-on-Ones | Targeted meetings with key accounts to secure anchor commitments. |
|  | Book-Building Updates | Periodic sessions with clients to review investor demand, pricing feedback, and allocation strategy. |
| **Negotiation, Closing & Post-Deal** | Negotiation Meeting | Direct discussions with clients and sometimes counterparties around terms, price, and structure. |
|  | Fairness Opinion Presentation | Delivery of a fairness opinion to the client’s board regarding the financial fairness of the transaction. |
|  | Final Pricing Meeting | Bankers and clients align on final price, size, and allocations before execution. |
|  | Closing Meeting | Signing agreements, reviewing last-minute changes, and executing the transaction. |
|  | Post-Deal Debrief | Review of investor feedback, deal performance, and discussion of future opportunities. |

Would you like me to extend this with a **“Typical Participants” column** (e.g., CFO, CEO, MD, VP, legal counsel, investors) so Aiden Banker can auto-suggest **who needs to be in the room** for each meeting?