Investment Proposal Template

A proposal earns trust by being easy to interrogate: every number sourced, every risk named, every assumption visible. This is the running order we use — if a section feels uncomfortable to write, that's usually the section the deal needed.

HOW TO USE THIS — Use it as the running order when you write a proposal — work through one section at a time, sourcing every number as you go.

01 Opening – one page maximum

- ☐ The deal in three sentences: asset, strategy, headline return
- ☐ What you're asking for: amount, structure, term
- ☐ Why this deal, why now, why you

02 The asset & the plan

- ☐ Property: address, type, condition, photos that tell the truth
- ☐ Purchase price with sold-comparable evidence
- ☐ Works: line-item budget, contractor quotes, timeline with contingency
- ☐ Strategy and end state: rented at £X (evidence), or sold at £Y (evidence)

03 The numbers

- ☐ Total funds required and exactly where every pound goes
- ☐ Returns at three scenarios: conservative, expected, favourable — with the assumptions of each stated
- ☐ Sensitivity: what a 10% value drop or 2% rate rise does to the return
- ☐ The investor's position: security, charge, order of repayment

04 Risk & governance

- ☐ The five biggest risks and the specific mitigation for each — generic risk lists impress no one
- ☐ What happens if the exit fails: the written fallback
- ☐ Reporting rhythm: what the investor receives, and when
- ☐ Track record: real past deals with real numbers, or an honest 'this is our third'