

Investor Data Room Folder Structure Template

A recommended folder organization for a data room that investors can navigate quickly and that looks professional and well-organized.

Recommended Folder Tree

```
01_Company_Overview/
├─ Company_Pitch_Deck.pdf
├─ Founder_Bios.pdf
└─ Cap_Table.xlsx

02_Financials/
├─ Audited_Financial_Statements/
├─ Monthly_Management_Reports/
├─ Budget_and_Projections.xlsx
└─ Metrics_Dashboard.pdf

03_Legal/
├─ Incorporation_Documents.pdf
├─ Shareholders_Agreement.pdf
├─ Previous_Funding_Round_Documents/
└─ Ongoing_Disputes.pdf

04_Intellectual_Property/
├─ Trademark_Registrations/
├─ IP_Assignment_Agreements/
└─ Open_Source_License_List.xlsx

05_HR/
├─ Org_Chart.pdf
├─ Founder_Vesting_Schedules.pdf
└─ Employee_Contract_Templates/

06_Commercial_and_Operations/
├─ Sample_Customer_Contracts/
├─ Product_Roadmap.pdf
└─ Competitive_Analysis.pdf

07_Tax_and_Compliance/
├─ Tax_Filings/
└─ Data_Protection_Compliance.pdf

00_NDA.pdf    ← the document every participant must sign before getting access
```

Why this order?

- **Folders 00 and 01** are the first ones an investor opens — putting the overview and NDA at the top speeds up the process.
- **Numbering** (01, 02, 03...) forces the folders to appear in your intended logical order instead of alphabetically.
- **Financials and legal** are usually where investors spend the most time — placing them early builds confidence.

File Naming Conventions

Rule	Example
Avoid spaces and special characters	Customer_Contract.pdf (not "Customer Contract.pdf")
Standardize dates as YYYY-MM	Monthly_Report_2026-08.pdf
Include version numbers	Cap_Table_v3.xlsx
Clearly mark drafts	Term_Sheet_DRAFT.pdf

Access Management Recommendations

- Grant staged access based on deal progress (e.g. only folders 01-02 for a first meeting, full access after an NDA or term sheet)
- Restrict sensitive financial details (salaries, individual customer contracts) to serious, later-stage prospects
- Track "last viewed" and "downloaded by" data for every document — this also tells you how engaged an investor really is

To set up this exact folder structure with folder-level permissions and view analytics: papertrack.io