Investor Messaging Templates for Founders

Craft impactful messages that get replies, powered by WealthVP.

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1. Introduction

Welcome to Investor Messaging Templates for Founders, created exclusively for WealthVP users! This booklet is designed to help you craft thoughtful, professional messages that support your outreach efforts and foster strong connections.

Leverage the power of WealthVP's platform to research investors, track engagement, and fine-tune your outreach using the included templates. Whether you're connecting for the first time or following up after a meeting, these messages will help you stand out and build meaningful relationships.

Let's take the next step toward building partnerships and exploring new opportunities together!

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2. Why Messaging Matters

Fundraising is about more than just having a great pitch deck - it's about building connections through meaningful communication.

Messages tailored to an investor's interests and portfolio increase response rates significantly. WealthVP makes this easier by providing insights into investor profiles and engagement metrics, helping you send the right message at the right time.

"Your outreach is your first impression—make it count!"

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3. How to Use This Booklet

Follow these steps to maximize your results with the templates:

Step 1

Choose the message type: Start by picking the template that best matches your situation.

Step 2

Customize the details: Use WealthVP's platform to research potential investors and their interests to tailor highlighted fields ([e.g., Investor's Name]).

Step 3

Send with confidence: Use WealthVP's engagement tools to refine your messaging over time.

Pro Tip: Combine WealthVP's platform insights with these templates to create outreach that truly resonates and drives results.

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4. Message Templates

4.1 Cold Introduction Templates

For making a strong first impression with a new investor.

Version A Industry-Focused Introduction	Subject: Innovating in [Industry]: [Startup Name] Hi [Investor's Name], I came across your profile on WealthVP and am impressed by your work in the [industry/sector] space, especially your investment in [specific company]. At [Startup Name], we're solving [specific problem] for [target audience] by [brief description of solution]. We've reached [milestone, e.g., "over 10,000 active users" or "$1M ARR"], and we're growing fast. I'd love to explore how your expertise aligns with our vision. Feel free to review our WealthVP profile here: [insert link]. Would you have time for a quick chat next week? Best, [Your Name] [Your Title] [Contact Info & Website Link]
Version B Traction Highlight Introduction	Subject: [Startup Name]: Exciting Growth in [Industry] Hi [Investor's Name], I'm [Your Name], founder of [Startup Name]. We're tackling [specific problems] in [industry] and have already achieved [key milestones or traction, e.g., "30% MoM growth"]. I noticed your interest in [industry/sector] on WealthVP, and I believe we could be a great fit for your portfolio. Would you be available for a quick call to explore this further? You can also learn more about us on our WealthVP profile: [insert link]. Best regards, [Your Name] [Your Title] [Contact Info & Website Link]
Version C	Subject: Shaping the Future of [Industry]: [Startup Name] Hi [Investor's Name],

Visionary Introduction	I hope this message finds you well. I'm the founder of [Startup Name], where we're transforming [specific aspect of the industry] with [innovative solution]. Our vision is to [big-picture goal], and we're building momentum with [specific accomplishment]. I saw your profile on WealthVP and believe your experience in [sector/field] makes you a natural fit for this journey. Can we connect for a quick conversation? Best regards, [Your Name] [Your Title] [Contact Info & Website Link]

4.2 Follow-Up Messages

For following up after no reply.

Version A Friendly Reminder	Subject: Following Up: [Startup Name] Hi [Investor's Name], I'm following up on my earlier message sent via WealthVP. At [Startup Name], we're making strides in [industry], and I believe our work aligns well with your expertise in [field]. Would you be open to a quick call to explore this further? Let me know what works for you! Best regards, [Your Name] [Your Title] [Contact Info & Website Link]
Version B Adding New Context	Subject: Update from [Startup Name] Hi [Investor's Name], I wanted to follow up and share an exciting update: [brief milestone or progress, e.g., "we just onboarded our 50th

	enterprise client"]. This update is also highlighted on our WealthVP profile: [insert link]. I'd love to discuss how this growth aligns with your investment interests. Would you have time for a 15-minute chat next week? Best regards, [Your Name] [Your Title] [Contact Info & Website Link]
Version C Polite and Persistent	Subject: Checking In: [Startup Name] Hi [Investor's Name], I know how busy your schedule must be, but I wanted to check in regarding my earlier message about [Startup Name]. We're addressing [specific problem] and have seen [traction or milestone]. Feel free to revisit our WealthVP profile for updates: [insert link]. Let me know if there's a better time to reconnect, or if there's someone else on your team that I should reach out to. Best regards, [Your Name] [Your Title] [Contact Info & Website Link]

4.3 Mutual Connection References

Leveraging shared contacts for warm introductions.

Version A Name-Drop Reference	Subject: Connecting via [Mutual Contact's Name] Hi [Investor's Name],

	[Mutual Contact's Name] suggested that I reach out to discuss [specific area]. At [Startup Name], we're addressing [specific problem] with [innovative solution]. Given your expertise in [sector], I'd love to explore a potential collaboration. You can learn more about us on our WealthVP profile: [insert link]. Are you open to a quick chat to discuss further? Best regards, [Your Name] [Your Title] [Contact Info & Website Link]
Version B Shared Interest Reference	Subject: Exploring Opportunities Together via WealthVP Hi [Investor's Name], [Mutual Contact's Name] recommended I connect with you because of your interest in [specific industry]. I also noticed your impressive track record in [specific sector] on WealthVP. At [Startup Name], we're tackling [specific problem] with [specific solution] and have recently achieved [milestone]. I believe there's strong alignment between your expertise and our mission. Would you have time to connect and explore potential collaboration? You can also learn more about us on our WealthVP profile: [insert link]. Best regards, [Your Name] [Your Title] [Contact Info & Website Link]
Version C Warm and Collaborative	Subject: Let's Connect via WealthVP: [Startup Name] Hi [Investor's Name], [Mutual Contact's Name] suggested we connect given your impressive track record in [sector]. I also came across your

	profile on WealthVP and was impressed by your work with [specific company or project]. At [Startup Name], we're addressing [problem] with [innovative solution] and have seen strong traction, including [specific milestone]. I'd value your perspective and would love to explore opportunities for collaboration. Would you be open to a 15-minute call? Feel free to visit our WealthVP profile to learn more: [insert link]. Best regards, [Your Name] [Your Title] [Contact Info & Website Link]

4.4 Investor Viewed Profile Follow-Up

Engaging investors who have shown interest by viewing your profile.

Version A Polite Inquiry	Subject: Thank You for Exploring [Startup Name] Hi [Investor's Name], I noticed you recently viewed [Startup Name] on WealthVP, and I wanted to personally reach out to share more about what we're building. We're addressing [specific problem] with [solution], and our recent traction includes [milestone]. I'd be happy to share more details about our growth plans and discuss how we might align with your expertise in [sector]. Would you have 15 minutes for a quick call? Best regards, [Your Name] [Your Title] [Contact Info & Website Link]
Version B	Subject: Excited to Connect: [Startup Name]

Highlighting Common Ground	Hi [Investor's Name], I noticed you recently viewed my profile on WealthVP, so I thought I'd reach out to share how [Startup Name] aligns with your interest in [specific sector]. We're solving [specific problem] and recently achieved [specific milestone, e.g., "a 40% increase in revenue last quarter"]. I'd love to discuss how our vision aligns with your investment goals. Are you available for a brief call next week? Best regards, [Your Name] [Your Title] [Contact Info & Website Link]
Version C Direct and Value-Focused	Subject: Following Up on Your Interest in [Startup Name] Hi [Investor's Name], Thank you for taking the time to view {Startup Name] on WealthVP. We're making exciting progress in [industry] with [specific traction or milestone]. I'd love to connect and discuss how our goals align with your portfolio. Would you be available next week for a quick chat? Best regards, [Your Name] [Your Title] [Contact Info & Website Link]

4.5 Post-Event Follow-Up

Reconnecting with investors after events or webinars.

Version A Highlighting Key Takeaway	Subject: Great Connecting via WealthVP at [Event Name] Hi [Investor's Name],

	It was great to connect during [Event Name] hosted by WealthVP. I really valued your insights on [specific topic discussed]. At [Startup Name], we're addressing [specific problem] with [specific solution]. I'd love to continue our conversation and explore potential opportunities to collaborate. Would you be open to a quick call next week? You can also find more about us on our WealthVP profile: [insert link]. Best regards, [Your Name] [Your Title] [Contact Info & Website Link]
Version B Friendly Follow-Up	Subject: Continuing the Conversation via WealthVP: [Event Name] Hi [Investor's Name], I enjoyed meeting you at [Event Name] and learning about your work in [sector]. Through WealthVP, I've had the chance to learn more about your investment interests and believe our vision at [Startup Name] aligns with them. We're solving [specific problem] with [specific solution], and I'd love to keep the conversation going. When would be a convenient time for a brief call? Best regards, [Your Name] [Your Title] [Contact Info & Website Link]
Version C Event Recap and Opportunity	Subject: Following Up After [Event Name] via WealthVP Hi [Investor's Name], I wanted to follow up after [Event Name] hosted by WealthVP and thank you for the engaging discussion about [specific topic]. At [Startup Name], we're making strides in [industry] with [specific traction or milestone].

Would you be open to a call to explore potential synergies? You can also explore more about our progress on our WealthVP profile: [insert link]. Let me know what works best for you.

Best regards,
[Your Name]
[Your Title]
[Contact Info & Website Link]

4.6 Milestone Sharing

Exciting updates to re-engage investors.

Version A

Growth Milestone

Subject: Exciting Update from [Startup Name]

Hi [Investor's Name],

I wanted to share some exciting news: [specific milestone, e.g., "We've surpassed 50,000 active users in just six months!"].

We're continuing to scale rapidly and would love to discuss how this aligns with your investment goals. Would you have 15 minutes for a quick conversation?

Best regards,
[Your Name]
[Your Title]
[Contact Info & Website Link]

Version B

Product Launch

Subject: Major Milestone Achieved at [Startup Name]

Hi [Investor's Name],

I'm thrilled to share that we've just launched [specific product or feature], which addresses [specific need or market opportunity]. Early feedback has been overwhelmingly positive, and we're seeing strong engagement from [target audience].

I'd love to discuss our plans for scaling this success further. When would be a good time to connect?

	Best regards, [Your Name] [Your Title] [Contact Info & Website Link]
Version C Funding Update	Subject: Progress Update from [Startup Name] Hi [Investor's Name], I'm excited to share that [Startup Name] has just closed [specific funding milestone, e.g., "a $1.5M seed round"] to support our growth in [industry]. As we continue to expand, I'd love to explore how we might work together to achieve even greater impact. Let me know when you'd be available to chat! Best regards, [Your Name] [Your Title] [Contact Info & Website Link]

5. Final Tips for Success

1. Do your research: Use WealthVP to explore investor profiles and align your outreach with investor interest.
2. Be concise: Keep messages under 150 words.
3. Show alignment: Highlight how your startup fits their focus areas.
4. Use WealthVP insights: Track profile views and engagement to prioritize outreach.
5. End with a call-to-action: Always include a clear next step.

Closing Note: WealthVP is here to support your fundraising journey every step of the way. Log into your profile today to apply these templates, update your milestones, and connect with investors who align with your vision.

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