

BRIGHT CAPITAL

Platform Guide

Private capital infrastructure for companies, investors, investment groups, fund managers, institutions and philanthropic funds.

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How to use this guide

This guide explains what Bright Capital does and how each module works. Your Bright Capital dashboard shows only your own real data — no sample portfolios, no illustrative returns. Use this document to understand a module before you set it up, then build it with your own records.

01 · OVERVIEW

Bright Capital overview

Bright Capital is one platform and one identity for the full private-capital lifecycle: starting a company, raising capital, discovering and managing investors, administering funds and vehicles, and running charitable capital. A single account can carry several roles and workspaces — Investor, Company, Fund Manager, Institutional, Family Office and Philanthropy — switched from your account menu without a second login.

- One identity, many workspaces. Roles and permissions travel with your account.
- Real data only. Every dashboard figure comes from records you or your counterparties created.
- Built-in compliance posture. Row-level access control, audit logging, and step-up authentication on sensitive actions.
- Global coverage. United States and Canada core, with European and African investor networks.
- Support. One contact for everything: support@brightcapital.fund.

Who it is for	What they run on Bright Capital
Companies & startups	Formation, cap table, fundraising, investor CRM, data rooms
Investors	Discovery, pipeline, commitments, portfolio, documents
Fund managers	Venture, rolling and scout funds, SPVs, roll-up vehicles, full fund administration
Institutions & family offices	Portfolio oversight, diligence, permissions, reporting
Philanthropy	Charitable funds, endowments, scholarships, grantmaking

02 · COMPANIES

For Companies & Startups

The company workspace is the operating system for your business: incorporate or connect an existing entity, keep ownership accurate, run your raise, and manage every investor relationship in one place.

- Company profile built from a structured founder, company, team and fundraising questionnaire.
- Cap table and equity records that stay in sync with every issuance, grant and conversion.
- Fundraising rounds with targets, terms, documents and commitment tracking.
- Investor discovery and a fundraising CRM with notes, reminders and outreach history.
- Secure data rooms, investor updates, and board and governance workflows.
- Team access with role-based permissions and a complete audit trail.

03 • FORMATION

Company Formation

Bright Formation incorporates your company in the United States and keeps the post-formation obligations on track. Choose your jurisdiction, entity type and services; pricing is itemised before you pay.

- All 50 states, the District of Columbia, and supported U.S. territories.
- C-Corporation and LLC formation with entity comparison guidance.
- Registered agent service and a compliant business address.
- EIN / tax identification assistance, including for non-U.S. founders.
- Founder equity issuance, 83(b) election workflow, and post-incorporation document set.
- Sensitive identifiers (SSN, ITIN, EIN) are collected through protected fields only — never placed in links, emails, profiles or logs.

04 • EQUITY

Cap Table & Equity Management

A ledger-based cap table: every position is the product of recorded transactions, so ownership always reconciles and history is never overwritten.

- Security classes for common, preferred, option pools and warrants.
- Issuances, transfers, cancellations, repurchases and splits recorded as ledger entries.
- Option grants, vesting schedules, exercises and plan-level pool tracking.
- SAFEs and convertible notes with conversion modelling.
- Scenario modelling for new rounds, pool top-ups and exit waterfalls.
- Stakeholder access with permissioned views and export controls.

05 • FUNDRAISING

Fundraising

Run the raise end to end: define the round, publish a controlled opportunity, and track every commitment through to close.

- Round setup with instrument, target, minimum and maximum ticket, valuation and close date.
- Private, invitation-only, institutional or public visibility per campaign.
- Commitment pipeline from interest through diligence, commitment and closing.
- Deal rooms, diligence request lists and closing checklists attached to the round.
- Investor updates and campaign analytics: views, conversion and pipeline by stage.

06 • INVESTOR CRM

Investor Discovery & CRM

Find the right investors and manage the relationship with the same rigour a sales team applies to a pipeline.

- Investor directory with filters for stage, sector, geography, cheque size and type.
- Saved searches, shortlists, comparison sets and alerts.
- Introduction requests with status tracking and daily-limit protection against spam.
- CRM records with notes, reminders, outreach events and owner assignment.
- European Venture Capital Network and African Investors Network coverage.
- Directory access, exports and volume limits follow your subscription entitlements.

07 • INVESTOR ACCOUNTS

Investor Accounts

The invest account is the investor-side workspace: onboarding, eligibility, discovery and everything you hold.

- Guided investor onboarding with identity, eligibility and preference capture.
- Deal discovery matched to your stated thesis, sectors, stages and geographies.
- Pipeline stages from discovered through diligence to committed or passed.
- Commitments, documents, agreements and data-room access in one register.
- Watchlists, spotlight opportunities and the startup bulletin board.

08 • PORTFOLIO

Portfolio Management

Portfolio analytics are computed from your own recorded positions, commitments and valuations. Until you record a position, the portfolio view stays empty by design.

- Positions by company, vehicle, instrument and vintage.
- Contributions, distributions and realised versus unrealised value.
- Valuation history and performance measures derived from your entries.
- Documents, agreements and updates linked to each holding.
- Exports for reporting, accounting and audit.

09 • FUND ADMINISTRATION

Fund Administration & Investor Management

Full back-office administration for vehicles you manage, from subscription to distribution.

- Investor register with commitments, ownership and contact of record.
- Digital subscriptions with KYC/KYB and e-signature.
- Capital calls, distributions and cash tracking.
- LP reporting, statements and document distribution.

- Data rooms, permissions and audit logging across the vehicle.

Vehicle	Structure	Coverage
Venture funds	Multi-year committed vehicles	Full administration
Rolling funds	Subscription-based quarterly closes	Full administration
Scout funds	Delegated cheque programmes	Full administration
SPVs & RUVs	Single-asset and roll-up vehicles	Full administration
Charitable funds	Endowment, scholarship, grantmaking	Charitable workflows

10 • VENTURE FUNDS

Venture Funds

Launch and administer a committed venture fund with the investor-facing and back-office workflows LPs expect.

- Fund entity setup, terms and close management.
- LP commitments, side letters and subscription documents.
- Capital call schedules and drawdown tracking.
- Portfolio company records, valuations and reporting cycles.
- Waterfall, carry and distribution administration.

11 • ROLLING FUNDS

Rolling Funds

Raise continuously instead of in a single close: subscribers commit per period and the vehicle rolls forward.

- Subscription-based commitments with periodic closes.
- Automatic renewal, pause and cancellation handling.
- Per-period allocation, call and reporting cycles.
- Investor communications tied to each subscription period.

12 • SCOUT FUNDS

Scout Funds

Delegate cheque-writing to a scout network while retaining oversight and reporting.

- Scout onboarding, mandates and allocation limits.
- Deal submission, review and approval workflow.
- Economics tracking per scout and per deal.
- Consolidated reporting across the scout programme.

13 • SPVs

SPVs & Roll-Up Vehicles

Consolidate many small cheques into a single line on the cap table, or aggregate an existing investor base.

- Single-asset SPV setup with deal terms and documents.
- Roll-Up Vehicles to consolidate existing holders into one entity.
- Digital subscription, KYC/KYB and countersignature flow.
- Fee and carry configuration, then distribution back to participants.

14 • SUBSCRIPTIONS

Digital Subscriptions

A compliant, fully digital subscription process replacing email and paper packets.

- Configurable subscription documents per vehicle and investor class.
- Identity verification (KYC) and entity verification (KYB).
- E-signature with countersignature and completion tracking.
- Status dashboard for every investor in the queue.
- Executed documents filed automatically to the vehicle's document set.

15 • DATA ROOMS

Secure Data Rooms

Share diligence material without losing control of it.

- Room-level and document-level permissions per member.
- Access requests with approval workflow.
- Activity logging: who opened what, and when.
- Q&A; threads, task lists and diligence request tracking.
- Revocation and expiry on access that should no longer stand.

16 • CASH FLOWS

Capital Calls & Distributions

Move capital in and out of the vehicle with an auditable trail on every notice.

- Call schedules with per-investor allocation and notice generation.
- Payment tracking, reminders and reconciliation against the register.
- Distribution calculation, including return of capital and gain components.
- Statements and confirmations delivered to each investor.
- Complete history retained for audit and reporting.

17 • PORTALS

LP / Investor Portals

A branded portal where your investors see their own position — and nothing else.

- Commitment, contributed, distributed and current value per investor.
- Capital call notices and distribution confirmations.
- Statements, tax documents and executed agreements.
- Fund updates and reporting packages.
- Permissioned document access with full audit logging.

18 • INSTITUTIONAL

Institutional & Family Office Solutions

Multi-strategy oversight with the controls larger teams require.

- Portfolio management across direct deals, funds and vehicles.
- Pipeline and diligence workflows with assigned owners and approvals.
- Team permissions, separation of duties and approval thresholds.
- Fund monitoring, consolidated reporting and export.
- Institutional-grade audit trail on every decision.

19 • INTELLIGENCE

Market Intelligence

Signals drawn from Bright Capital's verified organisation and investor data, plus your own activity.

- Investor and organisation coverage across sectors, stages and geographies.
- Directory counts and network composition from verified records.
- Your own funnel analytics: views, conversion, pipeline and outcomes.
- Saved searches and alerts when new matching records appear.
- No third-party market figures are presented as Bright Capital metrics.

20 • AI

AI Tools

AI is applied where it removes work, never to invent numbers.

- Investor-company matching scored against stated mandates and profiles.
- Pitch deck review with structured, section-by-section feedback.
- Copilot assistance across your own workspace records.
- Profile and questionnaire assistance for faster, more complete data.
- AI output is advisory; it never replaces your records or your judgement.

21 · PHILANTHROPY

Charitable & Philanthropic Fund Administration

Charitable capital administered with the same rigour as investment capital.

- Charitable funds, endowments and scholarship funds.
- Humanitarian and emergency funds with controlled disbursement.
- Grantmaking workflows: application, review, approval and payment.
- Donor records, pledges, stewardship notes and reporting.
- Restricted versus unrestricted balance tracking and audit trail.

22 · SECURITY

Security & Two-Factor Authentication

Access control is enforced on the server for every record, not in the browser.

- Row-level security so each account reaches only its own data.
- Two-factor authentication and step-up verification on sensitive actions.
- Session and device management with revocation.
- Audit logging on privileged and financial operations.
- Separation of duties: approvals cannot be granted to yourself.
- Sensitive identifiers are stored in protected fields and never exposed in links, logs or email.

23 • GET STARTED

How to Get Started

Five steps from sign-up to a working workspace.

1. Create your account at brightcapital.fund and confirm your email.
 2. Complete your profile so matching and eligibility work correctly.
 3. Secure the account by enabling two-factor authentication.
 4. Set up your role workspace — investor profile, company, fund or philanthropy vehicle.
 5. Add your real records — cap table, round, investors, vehicle or portfolio. Your dashboard fills as you do; it will never be pre-filled with sample data.
- Questions at any step: support@brightcapital.fund.

If you are a...	Start here
Companies	Set up your company workspace, then start a raise
Investors	Complete your investor profile, then open discovery
Fund managers	Create your first vehicle, then open fund administration
Institutions & family offices	Set up the investment workspace and invite your team
Philanthropy	Create the philanthropy workspace and define your funds

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This guide is provided for information only. It is not investment, legal, tax or accounting advice, and it does not constitute an offer to sell or a solicitation to buy any security. Figures shown in your Bright Capital dashboard are generated from your own records.