

Analyst-level investment research, modeling, and memo support without hiring full-time.

What this is	Who it is for	Core outcome
Flexible investment analyst support for screening, research, modeling, valuation, memos, and diligence preparation.	Investors, search funds, family offices, independent sponsors, founders, and small investment teams.	Clearer investment decisions supported by structured analysis, financial models, risks, and recommendation notes.

What we help with

- Company analysis
- Market and industry research
- Financial statement review
- Valuation support
- Investment memos
- Risk analysis
- Competitor review
- Management questions
- Deal summaries and recommendation notes

Common use cases

Deal screening: Review targets and identify which opportunities deserve deeper analysis.

Investment memo support: Prepare structured memos covering company overview, financials, market, valuation, risks, and next questions.

Financial modeling: Build models for acquisitions, investments, scenarios, and valuation analysis.

Due diligence preparation: Identify red flags, information gaps, and questions for management.

Ongoing deal flow: Provide recurring analyst capacity for teams without full-time support.

Ways to work with us

Investment Analysis Project	Monthly Analyst Support
<p>Best for a specific company, opportunity, transaction, or investment decision that requires focused support.</p> <ul style="list-style-type: none"> ● Company and market analysis ● Financial review ● Valuation support ● Risk analysis ● Investment memo or notes <p>Typical range: \$500-\$5,000</p>	<p>Best for small investment teams that need regular analyst-level support without hiring full-time.</p> <ul style="list-style-type: none"> ● Target screening ● Investment memos ● Financial models ● Due diligence support ● Pipeline and presentation support <p>Typical range: \$1,000-\$7,500/month</p>

Why Zerba & Co

Zerba & Co gives small investment teams access to finance analysis, modeling, valuation, and due diligence support without the cost or commitment of hiring a full-time analyst.

Need analyst-level support for your next investment decision?

Book a call or request an analyst support overview.

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