

# Confidential.io for M&A and Deal Data Protection

*Keep Sensitive Deal Documents Secure Across Parties, Stages, and Systems*

## USE CASE

Mergers, acquisitions, fundraising, and strategic deals involve constant sharing of highly sensitive documents—financials, legal agreements, IP, employee data, and more. These files move between buyers, investors, bankers, and counsel, often through unmanaged tools like email or cloud folders.

Confidential protects deal documents with built-in encryption, auditability, and access controls, so you maintain control over who sees what, even after it leaves your environment.

## THE CHALLENGE

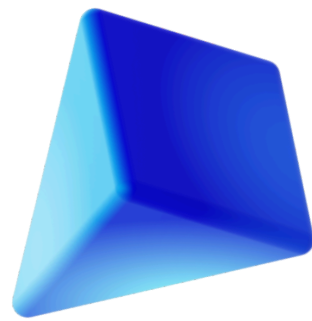
Deal-making demands rapid collaboration across parties, but it also comes with major risk:

- Confidential docs sent via email or unsecured links
- Files stored in personal cloud drives or external portals
- Sensitive information copied, downloaded, or forwarded
- No way to revoke access when terms change or deals collapse

Whether you're managing one bidder or five, without persistent protection, sensitive information can easily fall into the wrong hands.

## Why it Matters

- **High-Value Targets:** M&A and fundraising materials contain legal, financial, and competitive crown jewels
- **Loss of Control:** Deal documents are often shared beyond intended recipients, with no ability to revoke
- **Reputational Risk:** A single leak can damage trust, derail deals, or trigger lawsuits
- **Audit & Compliance Pressure:** Legal teams must prove governance over every version, access, and disclosure



# How Confidential Mitigates Third-Party Risk

Confidential gives you total control over sensitive deal data, from early-stage discussions to post-close diligence.

## Secure Document Exchange

Send encrypted deal documents with built-in access control and audit trails—no special viewer required.

## Persistent Protection

Security travels with the file across systems, inboxes, and cloud platforms, ensuring data stays protected wherever it goes.

## Granular Access Control

Limit what each party sees, down to the word, field, or section of a document.

## Full Visibility & Auditability

Track external file access, downloads, and interactions with complete audit trails for compliance, forensics, and vendor accountability.

## BUSINESS IMPACT



**Prevent sensitive deal data** from leaking or being misused by external parties



**Control access across all stakeholders** without friction or workflow disruption



**Prove governance and maintain legal defensibility** throughout the deal lifecycle



**Move faster** while protecting confidentiality and reducing risk

### Case in Point:



*In a recent startup acquisition, an investor accidentally forwarded a cap table to an unintended party, revealing sensitive ownership details and compensation structures. The breach damaged relationships and triggered months of legal fallout.*

**The lesson?** You can't afford to lose control of sensitive deal documents. Confidential keeps your data protected—before, during, and after the deal.