

INVESTOR ONE-PAGER

VERIT GLOBAL LABS INC.



Entity: Verit Global Labs Inc. (Delaware C-Corp, 2025)

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FRONT-PAGE ASK (ROUND TERMS) – AT 10/12/2025

Instrument: Y Combinator Post-Money SAFE (Valuation Cap)

Raise: \$250,000 (rolling close). **Minimum first close:** \$100,000. Target close: November 15, 2025.

Valuation Cap: \$8.5M post-money (cap-only; no discount). MFN included.

Pro-Rata: Side letter for checks $\geq$ \$25,000 (right to maintain % in next equity round).

Use of Proceeds: Complete C0 (Alpha), run 2 pilots to cutover, and reach C2 readiness without breaching the ops floor.

Information Rights: Quarterly KPI/update email until (i) first priced round or (ii) $\geq$ \$1M ARR.

Closing Mechanics: Rolling closes; funds applied immediately to dated milestones.

PROBLEM & WHY NOW

- Millions of micro-payouts create rounding drift, non-deterministic results, and audits that rely on screenshots instead of proofs.
- Finance & Compliance need **replayable evidence before money moves**; migrations and policy changes are risky without it.
- Leakage is material (0.5–2.0% of payouts) and manual reconciliation burns OPEX.

WHAT WE DO (NEUTRAL VERIFIER, NOT A MONEY MOVER)

- Recompute each payout window deterministically → emit machine-verifiable **Transcript** and **Outputs Digest**.
- Enforce **Acceptance Matrix (ACK/CT/SPV)** with freshness & quorum → **ALLOW/HOLD** with reasons, before funds move.

- Minimal change: add `window\_id` and `output\_digest` to ledgers; read-only connectors to ERP/PSP/banks.

PRODUCT PRIMITIVES

- **Perfect Reproducibility** — canonicalization, fixed fold order, integer-cent math, carry-ledger.
- **Content-Addressed Evidence** — per-window Transcript & Digest for replay equality.
- **Safe-Change** — canary promotion across N windows; instant rollback with evidence.
- **DR & Observability** — $DR \leq 4h$ target; metrics on parity, holds by reason code, time-to-approval.

ILLUSTRATIVE ROI (MID-MARKET MARKETPLACE)

Assumption	P10	P50	P90
Annual GMV	\$300M	\$500M	\$800M
Baseline leakage	0.8%	1.2%	2.0%
Captured (VRC)	50%	60%	70%
Verit fee (20% of VRC) + \$/window	~\$298k	~\$806k	~\$2.33M

Pricing: **20% of VRC + \$600 per window** (pilot: \$0 license). Replicated deployments post-Alpha: \$30–45k one-time with $\geq 75\%$ GM.

DESIGN-PARTNER MOTION (0→120 DAYS)

- Goal: 3 LOIs → 2 pilots → cutover. Evidence Pack: **3 accepted windows**, $DR \leq 4h$, exception register, GL export.
- Buyer committee: CFO/Finance (value), Head of Payments/RevOps (ops), CIO/CISO (risk).
- Security posture: read-only connectors, SOC-lite artifacts, DPA templates; never a money mover.

POSITIONING VS. ADJACENT TOOLS

- **PSPs (Stripe/Adyen)** execute payouts; Verit is **neutral** and pre-disbursement.
- **ERP close/recon (BlackLine/FloQast)** tie journals post-hoc; Verit **recomputes & authorizes** before funds move.
- **Treasury/ledgers (Modern Treasury, etc.)** handle initiation/workflow; Verit provides **proofs & ALLOW/HOLD**.
- **DIY scripts** lack determinism, transcripts/digests, and acceptance governance.

ROUND TERMS & USE OF FUNDS

Round	Instrument	Valuation Cap	Target Close	Pro-Rata/MFN
\$250k raise	YC Post-Money SAFE	\$8.5M post	Rolling (target Nov 15, 2025)	Pro-rata ≥\$25k; MFN

Use of Funds (first 6–9 months)	Dated Milestones
Complete C0 (Alpha) ; run 2 pilots ; reach C2 readiness without breaching Ops floor (\$80k).	Nov 30 '25: C0 complete • Jan 31 '26: Pilot #1 cutover • Feb 29 '26: Pilot #2 • Mar 31 '26: start C2

WHAT WE SHOW (EVIDENCE)

- Redacted Transcripts & Digests for three accepted windows; verifier manifest; DR report; GL export mapping.
- Security/SRE one-pager: SLO 99.9%, DR ≤ 4h, subprocessors/residency list.

CONTACT

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