



Candidate Guide: How to Create a Deal Sheet

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Introduction

A well-prepared deal sheet is essential for presenting your experience clearly and effectively. It enables employers to quickly assess your background while helping you identify gaps in your experience. A strong deal sheet is not just a list of matters—it is a strategic presentation of your experience. Clear organization, thoughtful detail, and precision will significantly strengthen your candidacy.

Even if you are not actively pursuing new opportunities, maintaining an up-to-date deal sheet is strongly recommended.

In this guide, you'll find the following resources to help you craft a detailed and impactful deal sheet:

1. Best Practices (pages 2-4)
2. Formatting Tips (pages 5-7)
3. Deal Sheet Template (pages 8-10)

11 Best Practices for Compiling a Deal Sheet

1 Maintain Your Deal Sheet Regularly

Update your deal sheet on an ongoing basis to ensure accuracy and completeness.

Example:

- “Advised issuer in \$150M senior notes offering (March 2026).”

2 Integrate Early Experience into Your Resume

If your experience is limited, include representative matters within your résumé rather than creating a separate deal sheet.

Example:

- “Assisted in due diligence and drafting for Series B financing of a technology startup.”

3 Clearly Define Your Role

Specify your responsibilities in each matter to demonstrate the depth of your involvement.

Example:

- “Drafted disclosure sections of prospectus and coordinated due diligence with client and opposing counsel.”

4 Protect Confidential Information

Do not include confidential client information. Use generalized descriptions where appropriate.

Examples:

- “Represented a global pharmaceutical company in a licensing transaction.”
- “Advised a foreign bank in cross-border financing.”

11 Best Practices for Compiling a Deal Sheet

5 Highlight Key Legal Issues

Include noteworthy or complex issues and how they were resolved, where appropriate.

Example:

- “Addressed cross-border regulatory constraints by restructuring transaction through a foreign subsidiary.”

6 Include Relevant Non-Closing Matters

Matters that did not close may still be valuable if they demonstrate substantive experience.

Example:

- “Advised private equity firm on proposed acquisition of manufacturing company (transaction terminated prior to signing).”

7 Organize by Practice Area

Group matters into logical categories to improve readability and allow quick assessment.

Example categories:

- Mergers & Acquisitions
- Capital Markets
- Private Equity
- Finance (securitized/cash flow/asset based)

8 Include Dates

List the month and year for each matter, presented in reverse chronological order.

Example:

- “IPO – Represented underwriters in \$300M offering (June 2025).”

11 Best Practices for Compiling a Deal Sheet

9 Summarize Repetitive Work

Consolidate similar transactions, particularly for the same client.

Example:

- “Represented regional bank in 12 secured lending transactions (2023–2025), ranging from \$10M to \$75M.”

10 Be Prepared to Discuss Every Entry

You should be able to clearly explain each matter, including structure, key issues, and your role.

Example preparation points:

- Deal structure (asset vs. stock purchase)
- Key issues (indemnification, regulatory approval, collateral matters, etc.)
- Your contributions (drafting, diligence, negotiation, closing)

11 Final Step: Proofread Thoroughly

Carefully review your deal sheet for accuracy, clarity, and professionalism before sharing it with employers.

Tips for Compiling the Document

Formatting Tips

- Use **bullet points and consistent formatting**
- List transactions in **reverse chronological order**
- Keep descriptions **concise and results-oriented**
- Always **protect confidential information**



1 Align with Your Target Practice Area

Focus on the types of matters most relevant to the roles you are pursuing.

Example:

- Targeting private equity → Lead with PE deals, not general corporate work
- Targeting capital markets → Separate debt and equity offerings

2 Lead with Your Strongest Experience

Order sections and entries to highlight your most impressive and relevant work first.

Example:

- Place “High-Profile Transactions” or “Select Experience” at the top
- Highlight large deal sizes or recognizable deal types (e.g., IPOs)

3 Adjust Level of Detail Based on Seniority

- Junior candidates: Emphasize tasks and responsibilities
- Mid-level/senior candidates: Emphasize deal ownership, decision-making, and client interaction

Example:

- “Led negotiation of purchase agreement and advised client on indemnification strategy.”

Tips for Compiling the Document

4 Customize Role Descriptions for Each Opportunity

Refine your “Your Role” section to match what the hiring firm values.

Example:

- For drafting-heavy roles → emphasize drafting experience
- For client-facing roles → emphasize communication and leadership

5 Emphasize Deal Size, Complexity, and Visibility

Highlight factors that strengthen your candidacy.

Examples:

- “\$1.2B cross-border acquisition”
- “Multijurisdictional regulatory approval process”

6 Refine Categories Based on Your Background

Modify or combine sections to best reflect your experience.

Examples:

- Combine “Finance” and “Private Equity” if work overlaps
- Add niche sections (e.g., “Restructuring,” “Venture Capital”) if relevant

7 Use Consistent, Clean Formatting

Consistency improves readability and professionalism.

- Keep headings uniform
- Use parallel sentence structure
- Limit descriptions to 1–3 concise lines per deal

8 Create Multiple Versions if Needed

Maintain slightly different versions of your deal sheet tailored to different opportunities.

Example:

- Version A: Emphasizes M&A
- Version B: Emphasizes capital markets

Formatting Tips for Candidates

9 Remove or De-Emphasize Less Relevant Work

Focus on quality over quantity.

Examples:

- Remove outdated or unrelated transactions
- Condense routine or repetitive matters

10 Prepare a “Detailed Version” for Yourself

Keep a more detailed internal version to support interview preparation.

Include:

- Additional deal details
- Key challenges and outcomes
- Talking points for interviews

Sample Deal Sheet Template

Use the format below to create your own deal sheet. Copy and repeat sections as needed.



[YOUR NAME]

Deal Sheet

[Practive Area(s)] [Law Firm/Organization]

Mergers & Acquisitions

Transaction:

[Buyer/Seller] – [Generalized client description]

Description:

[Brief overview of transaction (e.g., acquisition, merger, sale, joint venture)]

Deal Size:

[\$ Amount or approximate range, if appropriate]

Date:

[Month Year]

Your Role:

[Describe specific responsibilities—drafting, diligence, negotiation, etc.]

Key Issues/Notes:

[Highlight any complex legal or structural issues]

Status (if applicable):

[Closed/Pending/Transaction terminated prior to signing]

Sample Deal Sheet Template

Capital Markets

Transaction:

[Issuer or role – generalized description]

Description:

[IPO, debt offering, equity offering, etc.]

Deal Size:

[\$ Amount]

Date:

[Month Year]

Your Role:

[Drafting documents, coordinating diligence, managing process, etc.]

Key Issues/Notes:

[Regulatory, disclosure, or structural considerations]

Private Equity

Transaction:

[Private equity sponsor/lender/agent–generalized description]

Description:

[Investment, financing, leveraged buyout, etc.]

Deal Size:

[\$ Amount]

Date:

[Month/Year]

Sample Deal Sheet Template

Your Role:

[Describe contributions]

Key Issues / Notes:

[Structuring, negotiation, regulatory matters]

Consolidated Transactions Example (if applicable)

Transaction Group:

[Generalized client description]

Description:

[Type of repeat transactions]

Deal Size Range:

[\$ Range]

Date Range:

[Years]

Your Role:

[Typical responsibilities across matters]