



Investor Communication Checklist [Template]

1. Preparation

- Review previous investor communications for consistency.
- Gather recent business metrics and performance data.
- Consult with key departments for updates (e.g., finance, operations).

2. Quarterly Investor Letter

- Highlight significant achievements since the last update.
- Discuss progress on strategic goals.
- Outline future plans and expectations.
- Ensure the letter is clear, concise, and engaging.

3. Financial Summary

- Update key financial metrics (e.g., revenue, profitability, cash flow).
- Compare current figures against past performance and forecasts.
- Identify and explain any significant variances.

4. Officer Certificate

- Prepare a formal statement of compliance from the company's officer.
- Ensure all necessary legal and financial checks are completed.

5. Investor Meeting

- Schedule the meeting shortly after distributing the investor letter.
- Prepare an agenda based on the investor letter and summary.
- Include time for an open Q&A session.
- Organize an in-camera session for sensitive discussions.

6. Communication Delivery

- Distribute the investor letter and financial summary in a timely manner.
- Confirm receipt of all documents with investors.
- Follow up with a meeting invitation and agenda.

7. Feedback and Follow-up

- Encourage feedback during the investor meeting.
- Address all questions and concerns raised by investors.
- Send meeting minutes and action items post-meeting.
- Plan follow-up actions based on feedback and discussions.