

Financial Reviews

Venture First holds monthly meetings with clients where we discuss the previous month's financial performance and refresh the forecast. Depending on what stage our client is in, we will adjust our meeting deliverables appropriately.



Why Reviews Matter

Monthly reviews help clients identify certain problems that would otherwise go overlooked by analyzing the income statement. Venture First prepares a variance analysis of the income statement where we compare our forecasted numbers to what was actually reported in our most recent month's income statement. We have saved tens of thousands of dollars for each of our clients by quickly identifying unnecessary expenses that are eating away at their bottom line. With each monthly review, our variance becomes narrower, and as a result, we have more accurate forecasts because we learn more how our variable expenses move.

Why Venture First:

Our reviews aren't a templated, cookie cutter process where we look at a couple lines on the income statement. Venture First prepares monthly reviews that are tailored to be company-specific to meet the client's most immediate needs. Where a certain client may benefit more from a review of their KPI scorecard, another client may need a weekly short-term forecast to address their cash crunch. Further, our ability to work with our internal accounting and transaction teams enables a more robust, accurate, and data-rich report that always ends with actionable requests to move forward to the next month.