[**Note:** To complete this template, replace the bracketed text with your own content. Remove this note before you submit your paper.]

# Investor Report for [Company Name]

[Your Name]

Southern New Hampshire University

## Introduction

[Outline your company’s business and your vision for its future.]

[Introduce the company and its business. What is your vision for the future of the business? What do you hope to achieve? Where do you see the company in five years or ten?]

### Purpose

[Explain the purpose of the report and what you hope to convey about the company and its financials.]

[What do you plan to communicate, and why should your investors pay attention? In other words, try to persuade your investors that the accounting information you are about to share is important.]

### Methods and Approach

[Explain some management accounting methods you used to determine your costing strategy, evaluate your financial information, etc., and explain how these methods support the mission and vision of the company.]

[Briefly describe how your report and the data it represents adheres to industry standards and the AICPA code of ethics. In other words, why should your investors trust that you are delivering accurate financial data and that your decision-making process has been ethical?]

## Financial Strategy

[In this section, review your original business plan and costing strategies. Remove this note before you submit your paper.]

### Costing System

[Outline why the job order costing system works best for your business. Explain in detail the use of job order costing for this business. Be sure to compare and contrast the various costing systems you learned about in this course as part of your defense.]

### Selling Prices

[List the selling price you chose for each product.]

[Explain and defend the selling prices you established for each product. Why did you choose these prices? Be sure to reference your cost-volume-profit analysis in your defense]

### Contribution Margin

[Copy and paste your completed table from the “Contribution Margin Analysis” tab of your Project Workbook.]

[Share and explain your contribution margin per unit. How did you arrive at these numbers? Be sure to reference your cost-volume-profit analysis in your defense.]

### Target Profits

[Copy and paste the completed table from the “Break-Even Analysis” tab of your Project Workbook.]

[Specify the break-even points you determined for achieving different target profit levels. Then, explain and defend the target profits you selected for each area of your business. Be sure to reference your cost-volume-profit analysis in your defense.]

## Financial Statements

[This section is designed to have you assess your financial performance to date. Remove this note before you submit your paper.]

### Statement of Cost of Goods Sold

[Copy and paste your table from the “COGS” tab of your completed Project Workbook.]

[Compare the actual cost of goods sold over the last month and evaluate the company’s performance against the budgeted benchmarks. Are the numbers close to what you expected? Interpret the performance and explain what happened.]

### Income Statement

[Copy and paste your table from the “Income Statement” tab of your completed Project Workbook.]

[Based on your income statement, logically interpret the business’s performance against the provided benchmarks. Did the company do as well as expected? Explain what happened.]

### Variances

[Copy and paste your table from the completed “Variances” tab of your Project Workbook.]

[Illustrate the variances observed between the planned and actual values for the direct labor time and the direct materials price for collars. What changed?]

### Significance of Variances

[Share a summary of your variance analysis. Were the variances favorable or unfavorable?]

[Evaluate the significance of the variances. Are the variances favorable or unfavorable? What does it mean? Explain whether and how your evaluation will affect your budgeting and planning decisions for the next month or quarter.]

## References

[Include any references cited in your paper in full APA format. Don’t forget to include in-text citations as well.]