Board Finance Pack

What I think a board pack should do when the company is moving fast.

Context: I want board materials to force clarity, not just collect charts.

My View

- A board pack is not a screenshot dump. It is the company's finance narrative, risk map, and decision agenda.
- The best version is consistent enough for trend analysis and honest enough that bad news is visible before it becomes theater.

What I Include

- Executive summary: what changed, what matters, what decision is needed.
- Cash/runway: current cash, burn bridge, financing assumptions, downside case.
- Operating performance: revenue, gross margin, churn/retention, unit economics, logistics/inventory, usage cost, vendor movement, headcount.
- Risk and asks: tax/compliance, treasury, AP/AR, deferred revenue, inventory, open decisions, and owner/action list.

What I Have Done Before

- Supported investor reporting, fundraising forecasts, operating plans, KPI reporting, diligence materials, data-room updates, and finance dashboards.
- Supported roughly $19M of fundraising activity across Seed and Series A.

What I Would Ask In The Room

- Which metric would make us change the plan this month?
- Which assumption is most fragile?
- What are we explaining clearly to the board but not yet managing weekly internally?

Public version: methodology and judgment only. I can walk through examples live; raw company files stay private.