



# Financial Review Report Guidelines

The Financial Review report is the mechanism for communicating the results of the Financial Review to the Chapter Board and members. The report should contain an introductory paragraph, a list of participants, a statement of scope and purpose, a summary of findings, and the review team's opinions and suggestions. The reviewers should sign the final report. Suggested content for each section is outlined as follows:

## **Introduction**

- Statement of financial responsibilities of the chapter and the Financial Review committee
- Date, usually the last day of the fieldwork

## **Participants**

- Financial Review team
- Assisting members, usually the Business Manager and the VP of Finance

## **Scope and Purpose**

- Reason for performing a Financial Review
- List of items reviewed

## **Summary of Findings**

- Brief opinion of financial status of the chapter
- Brief statement of what was found for each item in the Scope list above

## **Opinions**

- A more detailed treatment of the opinion in Summary above

## **Suggestions**

- Items determined by the review committee as opportunities for improvement

## **Signatures**

- Signatures of the Reviewers