**CHECKLIST: DEALING WITH SHAREHOLDERS AND INVESTORS**

**QUESTIONNAIRE: HOW USER-FRIENDLY IS MY ANNUAL REPORT?**

Annual reports are an integral part of not only an annual shareholder meeting, but also your company’s reputation. The annual report must accurately describe the financial condition of the company and its future direction. The following questionnaire will help you determine whether your annual report satisfies the interests of analysts and shareholders.

**Yes No**

My annual report provides analysis and a sense of

direction for the following year and not just a recap of the past year.

My annual report makes financial data immediately available

and encapsulates it through graphs and charts.

My annual report's narrative is future-oriented, and describes

Growth plans and management philosophy.

My annual report is written in a way that appears to tell

my company's storey to the average shareholder.

My annual report uses descriptive headings and sub-headings

to communicate to readers who only skim the report, and to

draw them into reading more thoroughly.

My annual report contains a brief but thorough synopsis of

my company's markets and lines of business.

My annual report's operations review tells the storey quickly

and concisely, and describes how divisions fare in their

respective markets.

My annual report is attractively packaged, with an engaging

cover, pictures, captions, and other elements that catch

an average shareholder's attention.

My annual report is written with its role as a marketing tool

in mind, and would be useful to a shareholder recommending

my company's stock to a friend or relative.

The more "Yes" answers you gave, the more your annual report satisfies the reported interests of both analysts and shareholders. The more "No" answers you gave, the more you may wish to explore reformatting your annual report to fulfil its potential value to your company.