

Preparing for Your First IPO According to Jason Wood CEO

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LARGO, FL, USA, March 5, 2021 /EINPresswire.com/ -- [CEO Jason Wood](#) has experience as an entrepreneur that ranges from founder to IPO launcher. For many first-time business owners, the scariest part of owning the business becomes its IPO.

The initial public offering (IPO) refers to the moment when the business introduces its stock to transition from private ownership by one or a few individuals who are partners to a publicly owned company with shareholders, explains Jason Wood. This can become the make-or-break time for a business. Getting ready for an IPO requires an amalgam of paperwork and research plus you must meet government criteria.



Jason Wood CEO

[Jason Wood knows](#) how complex an undertaking the IPO is and offers the following advice on how to make the offering as fluid as possible. You need to tackle the plans for the IPO and developing the post-IPO business plan at the same time. At least a year before the IPO, you should begin preparing the post-IPO business plan. What follows are Jason Wood's tips for a better IPO.

Although it is the CEO's job ultimately to launch the IPO, your advisors matter. Choose appropriate, experienced auditors and attorneys. Work with a consulting a certified public accountant (CPA) to obtain an objective expert opinion, suggests Jason Wood.

Conduct a fiscal organizational assessment. Hire a team including a controller and an expert in

the Securities and Exchange Commission (SEC). The latter's expertise will prove vital to the SEC filings necessary for the IPO and thereafter, says CEO Jason Wood. The legally required paperwork generated by these publicly traded organizations for the SEC requires an expert.

Create the business procedures for the required financial reporting. In some cases, the SEC requires real-time reporting of fiscal data. This requires the implementation of budget and analysis tools capable of automated data gathering, analysis, and report generating.

Plan for changes to income tax filings and requirements. This includes IPO tax and valuation considerations and issues relating to net operating losses and tax credits for research and development covered by Section 382 of the Internal Revenue Code, and Interpretation 48 of Financial Accounting Standard 109.

Improve business processes and develop and implement risk controls. Prioritize financial data accuracy, [Jason Wood CEO said](#). You need a controller and chief financial officer conversant in Form S-1 submission, the Sarbanes-Oxley Act of 2002, and the Jump start Our Business Startups Act of 2012.

Update your risk assessment. Consult with your attorney and a CPA consultant.

Create positive investor relations by courting investors in-person. Many people in business refer to this as the "road show" because you and your management team actually embark on a small tour of major cities in which your optimum key investors reside, explains Jason Wood. For example, a business tech or fintech firm would visit Mountain View and Redmond, CA. Those seats of tech companies house many of the top investors for those areas. Your road show might also take you to Europe or Asia. During this time, the controller takes the helm at the business' corporate office to ensure smoother operations.

Develop your major metrics. You might think your GAAP financials are all you need, but public investors want to see more than that. You develop key operating metrics that cater to what these preferred investors want to read. At a minimum, your CFO's presentation should include net income, revenue, outlook, and operating cash flow reports. Use honest appraisals with realistic scenarios. Your projections should provide an accurate, not hopeful, forecast of return on investment.

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