YOUR  
LOGO

**COMPANY NAME**

FINANCIAL-ADVISORY PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] to provide financial advisory services for your organization. Our approach focuses on aligning financial strategies with your business objectives to improve profitability, risk management, and long-term value.  
  
This proposal outlines our customized financial advisory solution for [Client Name].

# Project Objectives

The primary goals are:  
  
- Improve financial planning, forecasting, and decision-making  
- Optimize capital structure and funding strategies  
- Identify financial risks and opportunities for improvement  
- Provide strategic financial insights to guide growth

# Proposed Services

Our financial advisory services include:  
  
- Financial health and performance assessment  
- Budgeting and forecasting assistance  
- Capital structure review and optimization  
- M&A readiness or transaction support  
- Risk management and scenario planning

# Scope of Work

Scope includes:  
  
- Initial consultation and financial review  
- Data collection and analysis of financial statements and KPIs  
- Strategic recommendations and reporting  
- Optional support for execution or implementation  
- Ongoing advisory meetings (if retained)

# Timeline

Proposed project timeline:

|  |  |  |
| --- | --- | --- |
| Phase | Description | Estimated Date |
| Initial Review | Analyze current financial data and priorities | [Start Date] |
| Strategic Analysis | Evaluate structure, performance, and opportunities | [Date] |
| Advisory Recommendations | Develop and present financial roadmap | [Date] |
| Support & Handoff | Assist with execution and provide documentation | [Completion Date] |

# Pricing

Estimated cost breakdown for financial advisory services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| Financial Review | Initial assessment and data analysis | [Amount] |
| Strategic Planning | Develop financial recommendations | [Amount] |
| Reporting & Meetings | Deliver findings and conduct advisory sessions | [Amount] |
| Ongoing Support | Optional implementation support | [Amount] |
| Total Estimated Fee |  | [Total] |

# About Us

[Your Company Name] is a trusted financial consulting firm specializing in strategy, risk management, and financial performance improvement.  
  
- Experience: [X] years advising SMEs and large enterprises  
- Expertise: Financial modeling, restructuring, growth strategy  
- Mission: To help businesses make smarter financial decisions and achieve sustainable success

# Case Studies / Testimonials

Case Study: [Client Example]  
  
- Project: Financial turnaround advisory for a manufacturing company  
- Outcome: Improved cash flow forecasting and achieved 12% margin growth  
  
Testimonial:  
“[Your Company Name] gave us clarity and confidence in our financial strategy. Their insights were both practical and transformative.” — [Client Contact]

# Terms and Conditions

Payment Terms: 50% upon project start, 50% upon final report.  
Service Scope: Includes assessment, strategic planning, and reporting.  
Client Responsibilities: Provide financial data, access to leadership, and internal collaboration.  
Adjustments: Any changes to scope or schedule must be mutually agreed in writing.

# Acceptance

To approve this financial advisory proposal and initiate services, please sign below.  
  
Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Name: [Client Name]  
Title: [Title]  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_