YOUR  
LOGO

**COMPANY NAME**

FINANCIAL ADVISORY PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] for your financial advisory needs. We provide objective financial guidance to help businesses improve performance, manage risk, and plan for long-term success.  
  
This proposal outlines how we will support [Client Name] with tailored financial analysis, forecasting, and strategic advice.

# Problem or Opportunity

[Client Name] is facing challenges or seeking guidance related to budgeting, cash flow, investment decisions, or financial planning. Making the right financial moves now is critical for stability and growth.

# Proposed Solution

We propose a financial advisory engagement that includes assessing your current financial position, identifying improvement opportunities, and delivering actionable insights.  
  
Key Benefits:  
- Clear financial reporting and forecasting  
- Improved cash flow management  
- Support for strategic financial decisions

# Scope of Work

Our financial advisory services include:  
  
- Financial health assessment and KPI review  
- Budgeting and forecasting  
- Cash flow analysis and optimization  
- Investment or capital planning support  
- Risk management and financial controls  
- Monthly or quarterly advisory meetings

# Timeline

Expected timeline for onboarding and financial review sessions:

|  |  |  |
| --- | --- | --- |
| Milestone | Description | Estimated Date |
| Initial Consultation | Discuss financial goals and history | [Start Date] |
| Data Review | Analyze reports, budgets, and cash flow | [Date] |
| Strategy Development | Create recommendations and forecasts | [Date] |
| Ongoing Advisory | Monthly or quarterly check-ins | [Recurring Date] |

# Pricing

Estimated pricing for financial advisory services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| Financial Review | Assessment and report creation | [Amount] |
| Forecasting & Budgeting | Cash flow and financial planning | [Amount] |
| Ongoing Advisory | Meetings and strategic support | [Amount] |
| Total |  | [Total] |

# About Our Company

[Your Company Name] is a financial consulting firm helping businesses navigate complex financial decisions and build strong foundations.  
  
- Experience: [X] years in financial planning and analysis  
- Specialties: SMEs, startups, nonprofit organizations  
- Mission: To provide trusted financial advice that empowers informed decision-making

# Case Studies / Testimonials

Case Study: [Previous Client Name]  
  
- Project: Ongoing advisory for a growing services company  
- Outcome: Improved cash reserves by 30% and optimized budgeting process  
  
Testimonial:  
“[Your Company Name] gave us the clarity we needed to manage our finances and grow sustainably.” — [Client Name], [Title], [Company]

# Terms and Conditions

Payment Terms: Monthly retainer or hourly billing as agreed.  
Confidentiality: All financial data is handled with strict confidentiality.  
Termination: 30-day written notice required to terminate services.

# Acceptance

To begin your financial advisory engagement, please sign below.  
  
Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Name: [Client’s Printed Name]  
Title: [Client’s Title]  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_