YOUR  
LOGO

**COMPANY NAME**

FINANCIAL MODELING

PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] to support your financial modeling needs. Our models provide the clarity and insights needed for informed decision-making, investor presentations, budgeting, and strategic planning.  
  
This proposal outlines a custom financial modeling engagement designed to meet the unique objectives of [Client Name].

# Problem or Opportunity

[Client Name] is seeking a dynamic, well-structured financial model to forecast performance, raise capital, analyze scenarios, or make data-driven business decisions.

# Proposed Solution

We propose to build a comprehensive financial model tailored to your business and goals.  
  
Key Benefits:  
- Custom-built model aligned with your operations  
- Reliable forecasts for planning or fundraising  
- Flexible scenarios and clear dashboards

# Scope of Work

Our financial modeling services include:  
  
- Discovery session to understand business drivers  
- Assumptions input sheet and driver analysis  
- 3-statement model (P&L, Balance Sheet, Cash Flow)  
- Forecasting (monthly/quarterly)  
- Scenario and sensitivity analysis  
- Investor or board-ready outputs

# Timeline

Estimated schedule for model development and delivery:

|  |  |  |
| --- | --- | --- |
| Milestone | Description | Estimated Date |
| Discovery Session | Align on goals, inputs, and outputs | [Start Date] |
| Draft Model | Build initial version of financial model | [Date] |
| Review & Feedback | Incorporate feedback and iterate | [Date] |
| Final Delivery | Deliver completed model and walkthrough | [Completion Date] |

# Pricing

Estimated pricing for financial modeling services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| Model Design | Input sheet, structure, and logic | [Amount] |
| Scenario Analysis | Sensitivity tables and drivers | [Amount] |
| Final Outputs | Investor/board deck ready sheets | [Amount] |
| Total |  | [Total] |

# About Our Company

[Your Company Name] provides financial strategy and modeling services to startups, growth-stage companies, and investors.  
  
- Experience: [X] years in financial planning and analysis  
- Tools: Excel, Google Sheets, financial modeling best practices  
- Mission: To turn complex data into clear, actionable insights

# Case Studies / Testimonials

Case Study: [Client Business Name]  
  
- Project: Investor-ready financial model for SaaS startup  
- Outcome: Successfully raised $1.2M seed round using model  
  
Testimonial:  
“[Your Company Name] built a model that not only impressed investors but gave us insight into our own business.” — [Client Name], [Title]

# Terms and Conditions

Payment Terms: 50% upfront, 50% upon final delivery.  
Revisions: Includes 2 rounds of revisions within scope.  
Confidentiality: All data and outputs remain client property and confidential.

# Acceptance

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