YOUR
LOGO

**COMPANY NAME**

VIRTUAL CFO

PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Firm Name] as your Virtual CFO partner. We provide high-level financial strategy, forecasting, and advisory services designed to help growing businesses gain clarity, control, and confidence in their finances.

This proposal outlines how we will support [Client Name] with tailored virtual CFO services.

# Problem or Opportunity

[Client Name] is looking for strategic financial oversight, improved forecasting, and more structured reporting without the cost of hiring a full-time CFO.

# Proposed Solution

We propose an ongoing Virtual CFO engagement that includes financial oversight, forecasting, reporting, and advisory meetings.

Key Benefits:
- Proactive financial guidance from a dedicated expert
- Greater visibility into cash flow and performance
- Informed decision-making and strategic planning

# Scope of Work

Our Virtual CFO services include:

- Monthly financial review and reporting
- Budgeting and forecasting
- Strategic financial planning and KPI tracking
- Cash flow analysis and management
- Investor or board reporting (if applicable)
- Monthly or biweekly advisory calls

# Timeline

Estimated onboarding and ongoing service schedule:

|  |  |  |
| --- | --- | --- |
| Milestone | Description | Estimated Date |
| Onboarding | System access and goal setting | [Start Date] |
| Initial Financial Review | Analysis of current state | [Date] |
| Reporting Cycle | Monthly close and report delivery | [Ongoing] |
| Advisory Meetings | Biweekly or monthly strategy calls | [Ongoing] |

# Pricing

Estimated monthly pricing for Virtual CFO services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Monthly Cost |
| Financial Reporting | P&L, balance sheet, KPI dashboard | [Amount] |
| Forecasting & Planning | Cash flow and budget forecasting | [Amount] |
| Advisory Sessions | CFO-level strategy meetings | [Amount] |
| Total |  | [Total] |

# About Our Firm

[Your Firm Name] helps businesses scale profitably through expert financial guidance. Our virtual CFOs bring big-firm experience to growing organizations at a fraction of the cost.

- Experience: [X] years in finance, accounting, and operations
- Background: CFOs with startup, mid-market, and investor-facing experience
- Mission: To empower entrepreneurs with the financial insight they need to succeed

# Case Studies / Testimonials

Case Study: [Client Business Name]

- Project: Ongoing VCFO support for SaaS firm
- Outcome: 2x improvement in gross margin and successful funding round

Testimonial:
“[Your Firm Name] became an extension of our executive team. Their insights transformed how we think about finances.” — [Client Name], [Title]

# Terms and Conditions

Payment Terms: Monthly fixed retainer, invoiced at start of each period.
Cancellation: 30 days’ written notice required to terminate engagement.
Confidentiality: All financial data and conversations remain strictly confidential.

# Acceptance

To begin the Virtual CFO engagement, please sign below.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Name: [Client’s Printed Name]
Title: [Client’s Title]
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_