YOUR  
LOGO

**COMPANY NAME**

FINANCIAL PLANNING PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] to support your financial goals. We specialize in customized financial planning strategies that prioritize long-term security, investment growth, and peace of mind.  
  
This proposal outlines our approach to helping [Client Name] develop a comprehensive and achievable financial plan.

# Project Objectives

The primary goals are:  
  
- Assess current financial situation and identify key goals  
- Create a tailored financial plan to build wealth and manage risk  
- Offer guidance on retirement, investment, insurance, and estate planning  
- Provide ongoing support and plan adjustments as life changes

# Proposed Services

Our financial planning services include:  
  
- Personal financial assessment and goal setting  
- Retirement and investment portfolio planning  
- Risk management and insurance evaluation  
- Tax efficiency and estate planning strategies  
- Regular reviews and plan updates

# Scope of Work

Scope includes:  
  
- Collection and review of financial data  
- Scenario modeling and strategy recommendations  
- Delivery of a comprehensive financial plan  
- Optional coordination with accountants and legal professionals  
- Follow-up meetings and annual plan reviews

# Timeline

Proposed project timeline:

|  |  |  |
| --- | --- | --- |
| Phase | Description | Estimated Date |
| Initial Consultation | Understanding goals and gathering information | [Start Date] |
| Strategy Development | Analysis and modeling of financial scenarios | [Date] |
| Plan Presentation | Deliver and discuss the financial plan | [Date] |
| Review & Adjustments | Incorporate feedback and finalize plan | [Completion Date] |

# Pricing

Estimated cost breakdown for financial planning services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| Initial Assessment | Review of financial documents and goals | [Amount] |
| Plan Development | Customized roadmap with investment and risk strategies | [Amount] |
| Review Meetings | Plan walkthrough and implementation guidance | [Amount] |
| Annual Review (optional) | Follow-up sessions to adjust plan | [Amount] |
| Total Estimated Cost |  | [Total] |

# About Us

[Your Company Name] is a financial advisory firm dedicated to helping individuals, families, and businesses create secure financial futures.  
  
- Experience: [X] years serving a diverse range of clients  
- Expertise: CFP® professionals with broad knowledge of markets and planning tools  
- Mission: To deliver smart, ethical, and client-focused financial guidance

# Case Studies / Testimonials

Case Study: [Client Example]  
  
- Project: Retirement plan for mid-career professional couple  
- Outcome: Created a 20-year roadmap and improved tax efficiency by 18%  
  
Testimonial:  
“[Your Company Name] made financial planning simple and actionable. We feel confident about our future.” — [Client Contact]

# Terms and Conditions

Payment Terms: 50% at engagement, 50% upon final plan delivery.  
Client Responsibilities: Provide accurate and complete financial information.  
Adjustments: Plan changes or additional scenarios may incur supplementary charges.

# Acceptance

To approve this Financial Planning Proposal and initiate services, please sign below.  
  
Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Name: [Client Name]  
Title: [Title, if applicable]  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_