YOUR  
LOGO

**COMPANY NAME**

EQUIPMENT LEASING ANALYSIS PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] to support your equipment leasing analysis. We specialize in financial analysis and operational planning that helps organizations make sound lease-or-buy decisions.  
  
This proposal outlines our approach to analyzing leasing options for [Client Name]'s equipment needs.

# Project Objectives

The primary goals are:  
  
- Evaluate the financial and operational impact of leasing versus purchasing equipment  
- Identify optimal lease terms based on usage, depreciation, tax treatment, and residual value  
- Provide a recommendation that supports cost efficiency and asset flexibility

# Proposed Services

Our leasing analysis services include:  
  
- Equipment requirement assessment and asset categorization  
- Comparative financial analysis (lease vs. purchase models)  
- Cash flow modeling and tax benefit calculations  
- Lease term benchmarking and vendor comparison  
- Recommendation report and strategic procurement roadmap

# Scope of Work

Scope includes:  
  
- Initial discovery and inventory review  
- Leasing market research and rate benchmarks  
- Scenario modeling across multiple timeframes and usage levels  
- Final summary report with recommendations and sourcing guidance

# Timeline

Proposed project timeline:

|  |  |  |
| --- | --- | --- |
| Phase | Description | Estimated Date |
| Discovery & Assessment | Review inventory and usage requirements | [Start Date] |
| Financial Modeling | Lease vs. buy projections and analysis | [Date] |
| Market Comparison | Rate research and vendor benchmarking | [Date] |
| Report Delivery | Recommendations and sourcing plan | [Completion Date] |

# Pricing

Estimated cost breakdown for leasing analysis services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| Initial Assessment | Equipment inventory and use case review | [Amount] |
| Modeling & Analysis | Cost comparison scenarios and calculations | [Amount] |
| Market Research | Rate and vendor benchmarking | [Amount] |
| Final Report | Strategic recommendation and sourcing plan | [Amount] |
| Total Estimated Fee |  | [Total] |

# About Us

[Your Company Name] is a financial and operational consulting firm with expertise in asset management, capital budgeting, and lease planning.  
  
- Experience: [X] years advising clients across industries on lease strategy and ROI  
- Expertise: IFRS 16, ASC 842, TCO analysis, lease negotiation  
- Mission: To deliver data-backed decisions that align with both short-term cash goals and long-term capital planning

# Case Studies / Testimonials

Case Study: [Client Example]  
  
- Project: Lease vs. buy assessment for industrial equipment across 12 locations  
- Outcome: $1.2M in savings over 5 years and improved equipment turnover  
  
Testimonial:  
“[Your Company Name] provided clear, defensible analysis that helped our leadership choose the right leasing structure.” — [Client Contact]

# Terms and Conditions

Payment Terms: [X]% deposit, balance upon delivery of final analysis.  
Scope: Includes comparative modeling, rate research, and recommendations.  
Client Responsibilities: Provide equipment specs, usage expectations, and vendor contracts.  
Adjustments: Additional categories or volume expansion may affect scope and pricing.

# Acceptance

To approve this Equipment Leasing Analysis Proposal and begin services, please sign below.  
  
Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Name: [Client Name]  
Title: [Title]  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_