

PROPOSAL · CA, LEGAL AND CONSULTING FIRMS

Proposal for Client name

Professional services, prepared for your team.

Prepared for Name **By** Your name **Date** DD/MM/YYYY

EXECUTIVE SUMMARY

Client name wants the outcome they described. We will deliver engagement plan and compliance calendar, measured by deadlines met.

Engagement plan

Why it matters to the client

Compliance calendar

Why it matters to the client

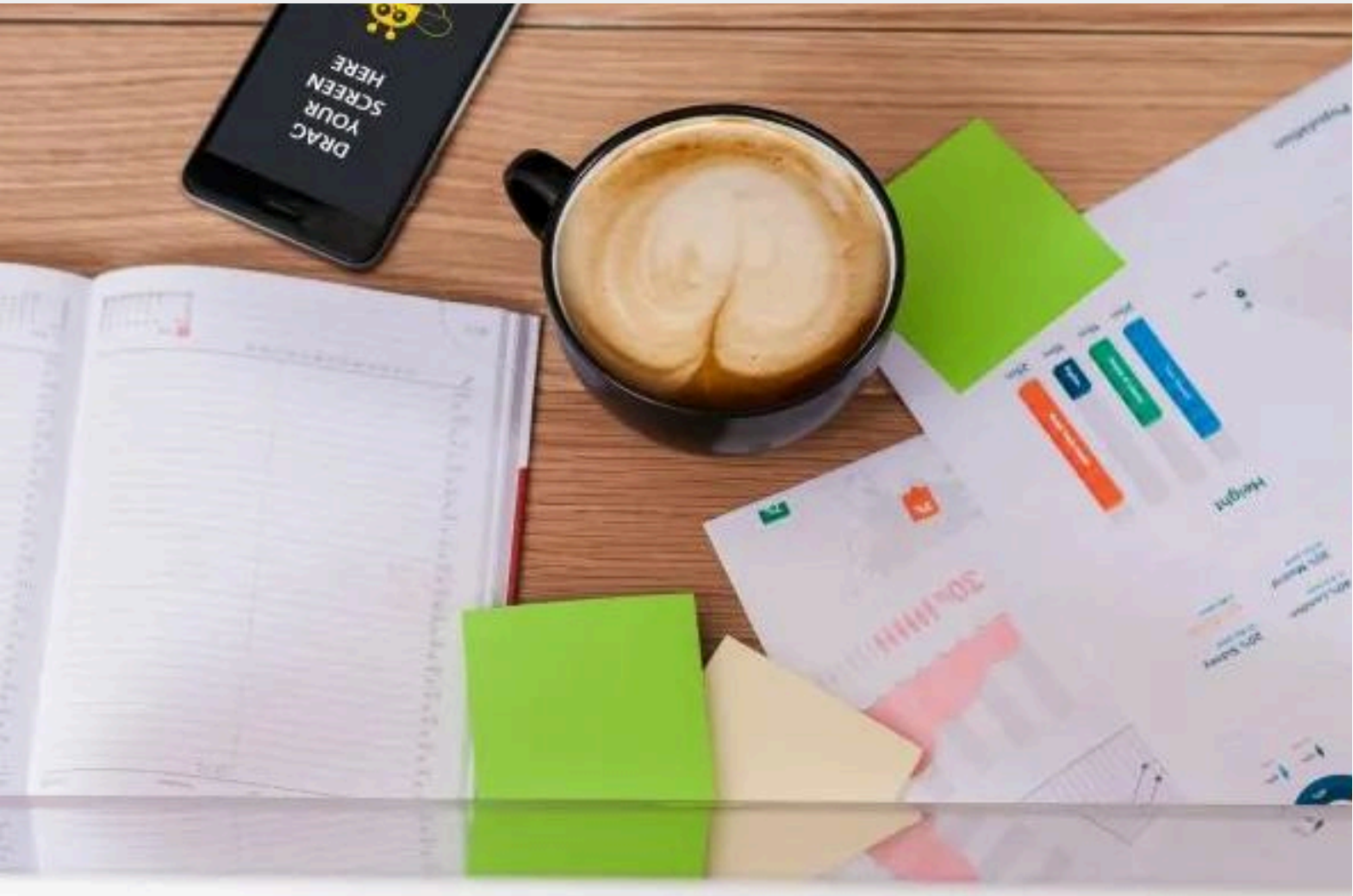
Monthly deliverables

Why it matters to the client

A NOTE FROM US

We are excited to help you reach a goal they named.

Sincerely,
Your name, role



YOUR CHALLENGE, OUR SOLUTION

Based on our conversations with your team, here is what we heard.

→ Challenge 1

What the client told you, in their words.

→ Challenge 2

What the client told you, in their words.

→ Challenge 3

What the client told you, in their words.

How we help.

Monthly management accounts

How this solves it

Quarterly review meeting

How this solves it

Priority support

How this solves it

PROJECTED IMPACT

What we can change for Client name

x%

Deadlines met

x%

Days to monthly close

x%

Open queries

INVESTMENT

Three ways to work together

Each package builds on the one before. Scale adds the marketing and most advanced features.

Starter

- Monthly compliance calendar
- Filings and returns
- Email support

Price: USD _____

RECOMMENDED

Growth

- Everything in Starter
- Monthly management accounts
- Quarterly review meeting
- Priority support

Price: USD _____

Scale

- Everything in Growth
- Advisory on growth and structure
- Board pack preparation
- Annual planning workshop

Price: USD _____

Taxes extra as applicable. Third-party fees billed at cost. Prices valid until **date**.

COMPARE

INCLUDED	STARTER	GROWTH	SCALE
Monthly compliance calendar	✓	✓	✓
Filings and returns	✓	✓	✓
Email support	✓	✓	✓
Monthly management accounts	·	✓	✓
Quarterly review meeting	·	✓	✓
Priority support	·	✓	✓
Advisory on growth and structure	·	·	✓
Board pack preparation	·	·	✓
Annual planning workshop	·	·	✓

TIMELINE

Phased timeline

1

Onboarding and records

2 weeks

2

First month close

4 weeks

3

Ongoing service

12 weeks

4

Annual review

1 week

Start date **date**. Dates move with approvals and inputs listed in the assumptions.

ASSUMPTIONS

- Client shares records by the agreed date each month
- Scope excludes litigation and representation unless agreed
- Government fees at cost
- One finance contact on the client side



NEXT STEPS

Ready to begin?

Choose a package, sign below and we start on date .

✓ Accept and sign

Accepted for Client company
Name, signature and date

For Your company
Name, signature and date