

Financial Advisory Consulting RFP Submission

1. Cover Letter

[Date]

[Client Name or Organization]

[Address]

Dear [Client Contact]:

On behalf of [Firm Name], we are pleased to submit our proposal in response to your Request for Proposal for Financial Advisory Consulting Services. We are committed to providing high-quality advisory services tailored to your organization's needs.

Sincerely,

[Your Name], [Title]

[Firm Name]

2. Firm Overview

[Brief description of your firm, including years in operation, location(s), areas of expertise, and unique value proposition.]

3. Understanding of the Project

[Provide a summary of your understanding of the client's requirements and objectives as outlined in the RFP.]

4. Proposed Approach & Methodology

1. Initial assessment and data gathering
2. Analysis and financial modeling
3. Development of recommendations
4. Preparation of final deliverables
5. Presentation to stakeholders

5. Project Timeline

Phase	Duration	Milestones
Project Kickoff	Week 1	Kickoff meeting & data request
Assessment & Analysis	Weeks 2-4	Deliver preliminary findings
Reporting & Recommendations	Weeks 5-6	Draft and review report

6. Team & Relevant Experience

- [Team Member Name] â€“ [Title], [Relevant experience and credentials]
- [Team Member Name] â€“ [Title], [Relevant experience and credentials]

7. Fee Structure

[Summarize your proposed fee structure, including hourly rates, project fees, expense policies, and payment schedule.]

8. References

- [Client Name, Project, Contact Information]
- [Client Name, Project, Contact Information]

9. Appendices

- Firm Brochure
- Team Member Resumes
- Legal and Compliance Disclosures