

# Financial Consulting Project Proposal

Date: \_\_\_\_\_

Prepared for: \_\_\_\_\_

Prepared by: \_\_\_\_\_

## 1. EXECUTIVE SUMMARY

Brief overview of the client’s needs, the project’s objectives, and the consulting approach.

## 2. PROJECT OBJECTIVES

- Objective 1
- Objective 2
- Objective 3

## 3. SCOPE OF SERVICES

- Service Area 1
- Service Area 2
- Service Area 3

## 4. PROJECT TIMELINE

Phase	Description	Timeline
Phase 1	Initial Assessment	Month 1
Phase 2	Implementation	Month 2-3
Phase 3	Review & Reporting	Month 4

## 5. PROJECT TEAM

- Name “ Role/Title
- Name “ Role/Title
- Name “ Role/Title

## 6. FEES & PAYMENT TERMS

Milestone	Amount	Due Date
Upon Signing	_____	_____
Mid-Project	_____	_____
Project Completion	_____	_____

Additional payment terms and billing details can be outlined here.

## 7. TERMS & CONDITIONS

Brief summary of contract terms, confidentiality, responsibilities, deliverables, and termination conditions.

## 8. ACCEPTANCE

Please sign below to indicate acceptance of this proposal and its terms.

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Client Name / Signature

Date: \_\_\_\_\_

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Consultant Name / Signature

Date: \_\_\_\_\_