

# Statement of Work (SOW)

## Financial Planning and Analysis Consulting

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

Client: \_\_\_\_\_

Consultant: \_\_\_\_\_

### 1. Purpose

The purpose of this Statement of Work (SOW) is to outline the scope, deliverables, and terms of engagement for Financial Planning and Analysis (FP&A) consulting services to be provided by the Consultant to the Client.

### 2. Scope of Work

- Assessment of current financial planning and budgeting processes
- Development of financial models and forecasting tools
- Analysis of business performance and key financial drivers
- Recommendations for process improvements and best practices
- Implementation support for approved initiatives
- Training and knowledge transfer to Client's internal team

### 3. Deliverables

- Initial assessment report
- Customized financial models
- Process improvement recommendations document
- Implementation roadmap
- Training materials and session delivery

### 4. Timeline

Milestone	Estimated Completion
Project Kickoff	Week 1
Assessment & Analysis	Weeks 2-3
Financial Model Development	Weeks 4-5
Recommendations & Roadmap	Week 6
Implementation & Training	Weeks 7-8

### 5. Roles and Responsibilities

- **Consultant:** Provide expertise, analysis, deliverables, and training as outlined above.
- **Client:** Provide access, data, and timely feedback; assign internal point-of-contact.

### 6. Fees and Payment Terms

Consulting fees: \_\_\_\_\_ (specify flat fee or hourly rate)

Payment schedule: \_\_\_\_\_

Expenses: Directly related, pre-approved expenses reimbursed by Client.

## 7. Confidentiality

Both parties agree to maintain confidentiality regarding proprietary and sensitive information shared during the engagement.

## 8. Acceptance & Signatures

**Client Representative:** \_\_\_\_\_ Date: \_\_\_\_\_

**Consultant:** \_\_\_\_\_ Date: \_\_\_\_\_