

Investment Strategy Consulting Scope of Work Example

1. Project Overview

This Scope of Work outlines the consulting services to be provided for developing and optimizing the client's investment strategy, in alignment with business objectives, risk tolerance, and current market conditions.

2. Objectives

- Assess current investment portfolio and strategy
- Identify areas for improvement and optimization
- Design a tailored investment strategy
- Develop implementation and monitoring guidelines

3. Scope of Services

- **Initial Assessment**
 - Portfolio analysis
 - Risk tolerance evaluation
 - Goal identification
- **Market Research**
 - Macro and microeconomic review
 - Industry and sector analysis
- **Strategy Design**
 - Asset allocation recommendations
 - Risk and return analysis
 - Investment policy statement draft
- **Implementation Plan**
 - Action steps and timeline
 - Performance metrics
- **Monitoring & Reporting Framework**
 - Periodic review schedule
 - Reporting templates

4. Deliverables

- Portfolio assessment report
- Market research summary
- Customized investment strategy document
- Implementation and review plan

5. Timeline

- Kick-off Meeting: Week 1
- Research & Assessment: Weeks 2–3
- Strategy Development: Weeks 4–5
- Delivery of Final Documents: Week 6

6. Client Responsibilities

- Provide access to relevant financial data
- Ensure timely feedback and approvals
- Facilitate meetings with key stakeholders

7. Terms & Conditions

- All information provided will remain confidential
- Consulting fees and payment milestones as per agreement
- Amendments to scope subject to approval by both parties