



Financial Services Proposal

Accounting, bookkeeping, or financial advisory proposal

Proposal Details

Prepared For

Client Name

Company

Address

Prepared By

Your Name

Company

Phone

Proposal Sections

1

Services Overview

Details about services overview for this proposal.

2

Approach

Details about approach for this proposal.

3

Deliverables

Details about deliverables for this proposal.

4

Reporting

Details about reporting for this proposal.

5

Team

Details about team for this proposal.

6

Fees

Details about fees for this proposal.

What Happens Next

Review this proposal carefully. If you have any questions or would like to discuss modifications, please don't hesitate to reach out. Once you're ready to proceed, sign the acceptance section below and return a copy to begin the engagement.

Acceptance & Authorization

By signing below, you accept this proposal and authorize the work to begin as outlined above.

Client Acceptance

Signature

Date

Print Name