Start with a Financial Needs Conversation

A brief introductory conversation can determine whether monthly FP&A support, a defined project, or a focused diagnostic is the best next step.

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Locations

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Remote service throughout the United States.

About the firm

Daniels BudgetWorks Advisory provides senior-level budgeting, forecasting, modeling, management reporting, and financial consulting for businesses and public organizations without requiring a full-time finance hire. The principal's experience spans public-sector organizations, publicly traded companies, and privately held businesses.

Daniels BudgetWorks Advisory is a division of Daniels Private Wealth, Inc. Financial-management consulting only. Services do not include investment advice, securities recommendations, audit or attestation services, legal advice, or tax advice.

DANIELS
BUDGETWORKS
ADVISORY

A Division of Daniels Private Wealth, Inc.

Senior-level financial analysis and planning without the cost of a full-time finance executive

BUDGETING | FORECASTING | MODELING
PUBLIC FINANCE | DECISION SUPPORT

Who we serve

Established service businesses, manufacturers, distributors, retailers, government contractors, local governments, special districts, Fire and EMS agencies, and select nonprofits.

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BudgetWorks FP&A Partnership

Monthly financial planning and analysis for better visibility, forecasting, and leadership support. The deliverables below describe the Standard tier; scope varies by tier.

- Annual budget and rolling 12-month forecast
- Cash-flow planning and variance analysis
- Financial and KPI dashboard
- Monthly leadership review
- One significant decision analysis each month
- Written recommendations and action priorities

Pricing

Focused from $3,000 per month

Standard $5,000 per month

Comprehensive from $7,500 per month

Onboarding from $2,500

Why BudgetWorks

- Experience across public-sector, publicly traded, and privately held organizations
- Clear, decision-ready models and reports
- Defined scope, deliverables, timing, and fees
- Flexible project or monthly-retainer support
- Direct access to the professional performing the work

Selected career results

- Approximately $3.7 million in projected annual staffing savings
- 20-year operating and capital planning model
- Approximately 75 percent reduction in recurring reporting time

Municipal and Public Safety Financial Performance Review

A defined financial and operational review for local governments, special districts, and Fire or EMS agencies.

- Revenue and expenditure trend analysis
- Staffing, overtime, and operating-cost analysis
- Capital replacement and long-range planning
- Alternative financial and staffing scenarios
- Executive findings and prioritized recommendations
- Management or governing-board presentation

Pricing

Full reviews start at $15,000. Typical engagements range from $15,000 to $40,000, depending on scope and complexity. Focused reviews with a limited scope start at $5,000.

Financial Model and Reporting Modernization

Practical models and reporting tools for organizations burdened by manual spreadsheets or delayed management information.

- Budget, forecast, cash-flow, staffing, or capital model
- Management dashboard and reporting package
- Automation of agreed-upon repetitive calculations
- Documented assumptions and instructions
- Staff training and 30-day technical correction period

Pricing

Projects start at $7,500. Typical range: $7,500 to $20,000. Continuing maintenance starts at $1,500 per month.

Additional options

Diagnostics start at $3,500; typical range $3,500-$7,500. Standard consulting is $200/hour; advanced modeling $250/hour; urgent consulting $300/hour. Five-hour minimum for hourly work. Final scope and fees are agreed in writing.