DANIELS
BUDGETWORKS
ADVISORY
A Division of Daniels Private Wealth, Inc.

Budgeting | Forecasting
Modeling | Decision Support

Capability Statement

Senior-level budgeting, forecasting, modeling, and management reporting for businesses and public organizations

Company Overview

Daniels BudgetWorks Advisory helps leaders turn budgets, forecasts, operating data, and long-range obligations into practical financial tools that control costs, clarify choices, and support confident decisions. The principal's experience spans public-sector organizations, publicly traded companies, and privately held businesses.

Core Capabilities

Outsourced FP&A Budgets, rolling forecasts, cash-flow planning, variance analysis, KPI dashboards, and monthly leadership support.

Municipal and Public Safety Finance Staffing and overtime analysis, budget optimization, capital planning, multiyear forecasting, and executive decision support.

Financial Models and Reporting Scenario models, dashboards, standardized reporting, workflow improvement, and automation of recurring calculations.

Representative Results

- Projected approximately $3.7 million in annual savings through staffing and overtime analysis.
- Developed a 20-year operating and capital cash-flow model used for broader organizational planning.
- Reduced recurring financial-reporting time by approximately 75 percent through process automation.

Primary Clients

- Established service businesses
- Manufacturers and distributors
- Retailers and multi-location businesses
- Government contractors
- Local governments
- Special districts
- Fire and EMS agencies
- Select nonprofits

Differentiators

- Direct principal involvement
- Public-sector, public-company, and private-company experience
- Defined scope and deliverables
- Decision-ready analysis
- Project and retainer flexibility

Company Information

Legal entity Daniels Private Wealth, Inc.

Operating division Daniels BudgetWorks Advisory

Principal Harold Daniels, MBA

Locations Florida: 6955 Mauna Loa Ln, Naples, FL 34113
New York: 6032 Route 242 E, Ellicottville, NY 14731

Service area Florida, New York, and remote U.S.

Schedule a financial needs conversation
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