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

Budgeting | Forecasting
Modeling | Decision Support

Services and Preliminary Pricing

Every engagement begins with a written scope covering deliverables, responsibilities, timing, and fees. Pricing is preliminary; final fees reflect complexity, data condition, departments, meetings, presentations, and timing.

Service	Core Deliverables	Preliminary Pricing
BudgetWorks FP&A Partnership	Standard tier: budget, 12-month forecast, cash-flow planning, variance analysis, KPI dashboard, leadership review, and one decision analysis per month. Scope varies by tier.	**Focused: from $3,000/month** Standard: $5,000/month Comprehensive: from $7,500/month Onboarding: from $2,500
Municipal and Public Safety Financial Performance Review	Full review: multiyear trends, staffing and overtime analysis, capital planning, scenarios, executive report, and presentation. Focused reviews address a limited scope.	**Full review: from $15,000** Typical: $15,000-$40,000 Focused review: from $5,000
Financial Model and Reporting Modernization	Customized model, dashboard, reporting package, agreed-upon automation, documentation, staff training, and 30-day technical correction period.	**Starts at $7,500** Typical: $7,500-$20,000 Maintenance: from $1,500/month
Financial Assessment or Diagnostic	Focused review of a defined financial issue, current process, available data, and recommended next actions.	**From $3,500** Typical: $3,500-$7,500
Hourly Consulting	Limited advisory work, supplemental analysis, meetings outside an agreed scope, or assignments unsuitable for fixed pricing.	**Standard: $200/hour** Advanced modeling: $250/hour Urgent: $300/hour Five-hour minimum

Standard Commercial Terms

- Monthly retainers are paid in advance and generally require an initial three-month commitment.
- Fixed-fee projects generally require 50 percent at signing, 25 percent at preliminary delivery, and 25 percent at final delivery.
- Work outside the written scope requires a change order and will be quoted separately or billed at the applicable hourly rate.
- Authorized travel, specialized software, subcontractor services, and significant out-of-pocket expenses are billed separately when applicable.

Schedule a financial needs conversation
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