

# About Proposal Templates

The following document is a typical business proposal template taken from one of the Proposal Packs available from my favorite proposal tools website.

These stand-alone Proposal Packs were created for just about any type of proposal you can imagine: business proposals, grant proposals, technical proposals, project proposals, sales proposals, and many more. They are stand-alone sets of proposal templates designed using industry standard guidelines. Each Proposal Pack includes a large collection of fully-formatted downloadable MS-Word templates with layout and graphics already done. You just fill in the blanks and easily create business proposals, from 3-pagers to full-blown 100-pagers.

When I first discovered these Proposal Packs, a part of me wanted to weep! Where were these high-quality, real-life proposal templates when I needed them over the years? Had I had access to these Proposal Packs years ago, and some of the related materials carried by ProposalKit.com, I certainly would have saved a lot of time, money, energy, and aggravation. (... and so would have many of my clients).

## Here are a few points that impressed me about this sample template:

- A professional looking document created for an actual real-life situation.
- Fully formatted in final submission form with layout and graphics included.
- Includes a very good one-page Executive Summary that focuses on solutions and benefits for the Client.
- Provides an excellent client-focused breakdown of the proposed work into: costs, contract terms, benefits, project management.

## Below are links to various types of Proposal Packs:

### Business Proposals:

<http://writinghelptools.com/cgi-bin/a/t.cgi?pkitsampbus>

### Grant Proposals:

<http://writinghelptools.com/cgi-bin/a/t.cgi?pkitsampgrt>

### Professional Proposals:

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### General Proposals and Tools:

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Believe me, I know from years of experience writing thousands of different business documents; the most effective way to develop a new one is to work from a model that has already been developed.

**Starting from a blank page and trying to reinvent the wheel is just not worth the time and trouble!**



## **Applied Accounting Services**

**12250 NE 131st Way, Suite 305  
Kirkland, WA 98034  
(PH) 425-740-8478 (FX) 425-740-8479  
AAServices.com**



August 20, 20xx

Rachel Kenberry  
General Manager  
Valley Fitness, Inc.  
17712 116th Way  
Kent, WA 98802

Dear Ms. Kenberry:

Thank you for taking the time to talk with me last week. I know that your business office accounting has been a high priority problem for you. I am therefore pleased to propose a cost effective solution that I believe will minimize your in-house burden.

As I explained when we met, we are specialists in Accounting and Payroll services with more than 40 years of experience. We pride ourselves in providing our clients with a professional service, guaranteed accuracy, and the highest level of confidentiality.

The attached cost summary is based upon your current needs and can be adjusted as we customize your services.

I look forward to discussing this project with you in more detail in the near future. Please contact me directly anytime you have additional questions or requests at 425-740-8478 (ext. 905).

Sincerely,

Marty Trasker  
President  
Applied Accounting Services

Attach:



# Project Proposal

## **Applied Accounting Services**

12250 NE 131st Way, Suite 305

Kirkland, WA 98034

(PH) 425-740-8478

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AAServices.com

August 20, 20xx

## **[ Project Title**

### **Provision of Accounting and Payroll Services**

**Prepared for:** Rachel Kenberry  
General Manager  
Valley Fitness, Inc.

**Prepared by:** Marty Trasker  
President  
AAS Inc.

## **[ Description**

Valley Fitness, Inc is in need of Accounting and Payroll services to take over for an overburdened owner/manager. With limited office staff, the accounting and payroll functions have been suffering. Outsourcing these office activities to AAS will allow the owners/management to focus on the core aspects of their business.

**Proposal Number: 534-20xx**



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# **[ Executive Summary**

## **The Objective...**

Valley Fitness, Inc is in need of Accounting and Payroll services to take over for an overburdened owner/manager. With limited office staff the accounting and payroll functions have been suffering. Outsourcing these office activities will allow the owners/management to focus on other aspects of the business.

## **The Goals...**

Valley Fitness, Inc is a small privately owned organization that now requires professional accounting and payroll services in a cost effective manner.

The goals of Applied Accounting Services are to:

- Provide Valley Fitness with professional accounting and payroll services.
- Provide these services at a lower cost than possible if done by in-house staff.
- Guarantee the on-time delivery of payroll, accounts payable, and other accounting services.

## **The Solution...**

Applied Accounting Services specializes in Full Accounting and Payroll services for mid-size businesses. All staff accountants are CPA's with additional tax attorney services available through our corporate office location in Seattle, WA.

We will provide Accounting Services to include:

- Daily, Quarterly and Yearly accounting reconciliations;
- Year End Tax statements and summaries;
- Quarterly tax Payment reports;
- Ledger Maintenance;
- Inventory account balancing.

Payroll Services to include:

- Standard pay period check determination and origination;
- Withholding allotments;
- Benefit Summaries.

Accounts Payable Services to include (upon request):

- Payment of all bills owing;
- Budget Plan negotiations;
- Negotiation of favorable terms.



# [ Client Operations

Valley Fitness is a privately owned and operated fitness club with three (3) locations currently operating in the Seattle area. Started in 20XX with 5 staff members, the clubs now employ 12 staff members per location, servicing a total client base of approximately 1,500 paid members.

Office accounting and payroll tasks are currently performed on a temporary basis by the owners who took over the responsibility when the fulltime accountant did not return from extended medical leave. This lack of a qualified fulltime accounting and payroll capability has led to numerous problems including: backlog of data entry, poor inventory control, payroll not met on time, and past due tax filings.

Once Applied Accounting Services becomes responsible for all accounting and payroll services, the owners of Valley Fitness will be able to return their focus to the fulltime management of their fitness clubs. The first priority of AAS will be to bring up to date, all accounting, payroll, accounts payable, and tax filings.

# **[ Cost Summary**

The following is an estimate and summary of the costs associated with Applied Accounting Services offering for Accounting and Payroll services. These numbers are an estimate only.

<b>Initial Account Set-Up:</b>	<b>Price</b>
Conversion from Valley Fitness to AA Services	\$ 1,200
Time period to cover January 1, 20XX to Present	\$ 300
Production of Q1, Q2 Reports	\$ 500
Production of Current standing report	
<b>Total Set-Up Costs:</b>	<b>\$ 2,000</b>
<b>Ongoing Monthly Costs</b>	
Daily Account Reconciliations	\$ 600 p/mo
Bi-Weekly Payroll	\$ 300 p/mo
<b>Total Ongoing Monthly Costs:</b>	<b>\$ 900</b>
<b>Ongoing Quarterly/Yearly Costs</b>	
Quarterly Tax Documents	\$ 400 p/qtr
Quarterly Filings	\$ 200 p/qtr
Quarterly Reports	\$ 500 p/qtr
Year End Summaries	\$ 300 p/yr
Year End Tax Filing Summaries	\$ 300 p/yr
Maintenance of Employee Benefit Reports	\$ 200 p/yr
<b>Total Ongoing Quarterly/Yearly Costs:</b>	<b>\$ 1,900</b>
<b>TOTAL SETUP AMOUNT</b>	<b>\$ 2,000</b>
<b>TOTAL MONTHLY AMOUNT</b>	<b>\$ 900</b>
<b>TOTAL QUARTERLY/YEARLY AMOUNT</b>	<b>\$ 1,900</b>

**Standard Disclaimer:** The numbers represented above are to be used as an estimate only. The above Cost Summary does in no way constitute a warranty of final pricing. Estimates are subject to change if the project specification or terms of contract are changed in any way.



# **[ Contract and Terms**

## **Completion of Initial Set Up:**

- 50% payment at contract signing;
- 50% payment at conversion completion;
- Any other initial balances owing.

## **Monthly Fees:**

- Due upon receipt of monthly invoice;
- Net 15 days.

## **Quarterly/Yearly Fees:**

- Will be billed on monthly invoice;
- Net 15 days.

## **Special / Additional Reports:**

- Will be billed as itemized on monthly invoice;
- Net 15 days.

## **Minimum Term of this contract:**

Minimum term of the terms and conditions specified in this proposal is twelve (12) calendar months, commencing on the first of the month following conversion completion. After the initial term of this contract, services will be provided on a continuing monthly basis at the current rate schedule. Current rates will be disclosed no less than 30 days prior to the end of the initial term of this contract. If a new contract for a period of 12 or more months is signed, the rates will be locked in at the current rate at the time of signing.

## **Cancellation:**

In the event of cancellation for any reason: 90 days written notice is required by either party. There are no pre-payment penalties. Cancellation of contract prior to the end of the initial term will require payment for all contracted services due to the end of the contract period, or for 90 days, whichever is longer.

## **Payments:**

Late Payment fees will be assessed on any account past due by 30 days.

## **Other:**

Final terms and conditions will be provided in the contract for services.





# **Benefits**

By utilizing Applied Accounting Services as your accounting and payroll source you will realize the following benefits:

- Lower overall cost for accounting needs;
- Greater flexibility in deadlines;
- Professional preparation of all tax, payroll, and benefit summaries;
- Timely processing of payroll and tax filings;
- Dedicated account manager who is completely dedicated to your company needs;
- Qualified CPA-level staff;
- Owners/managers not tied to office for extended periods of time;
- No need to hire or train accounting employees;
- Deadlines are the highest priority;
- No need to hire a separate tax attorney; as AAS maintains the staff in-house;
- Initial set-up includes everything necessary to get your business back on track;
- Complete confidentiality.

# [Project Management

Applied Accounting Services offers our entire office at your service. We will assign the following Account Manager to your company. She will be available to answer any questions or concerns that you may have. She can also discuss and add additional reports or summaries upon your request.

Valley Fitness, Inc. Account Manager  
Shelly Winters, CPA  
425-425-8565  
shelly.winters @ AAServices.com  
AAServices.com

If you have questions that need the expertise of a tax attorney, please contact:

Valley Fitness, Inc. Tax Attorney  
John Williams, JD  
425-425-8659  
john.Williams @ AAServices.com  
AAServices.com



# Proposal Templates

As I stated earlier, if you have a proposal to develop for any reason, you don't want to have to do that from scratch. It is always faster, cheaper and better to work from a professionally developed template.

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Shaun Fawcett, M.B.A.

<http://writinghelptools.com>