

Executive Financial Coaching Engagement Proposal

Date: [Insert Date]

To: [Client's Name]

[Client's Address]

Dear [Client's Name],

Thank you for considering my financial coaching services. I am excited about the opportunity to work with you to achieve your financial goals. Below is a detailed proposal outlining the coaching engagement:

Engagement Overview

The purpose of this engagement is to provide you with personalized financial coaching that aligns with your aspirations and objectives. Through one-on-one sessions, we will explore strategies to enhance your financial literacy, investment acumen, and overall wealth management.

Scope of Services

- Initial Assessment of Financial Situation
- Goal Setting and Financial Planning
- Investment Strategy Development
- Ongoing Support and Accountability

Session Details

Session Frequency: [Weekly/Bi-weekly/Monthly]

Duration: [Specify Duration of each Session]

Location: [Virtual/In-Person - Specify Location]

Proposed Fees

Coaching Fee: \$[Amount] per session. Total estimated cost for [Duration or Number of Sessions].

Next Steps

Please review this proposal and let me know if you have any questions or require adjustments. Once we finalize the details, I will provide you with a formal agreement for your review.

Thank you for considering this opportunity. I look forward to your positive response.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Your Contact Information]