

FOR FRACTIONAL CFOS

Fractional CFOs: The \$5K Proposal Template

close retainers without rewriting every time.

How to present high-retainer CFO services **without writing custom proposals, discounting your pricing, or losing deals after the call.**

HOW TO USE THIS TEMPLATE

This is not a sales deck. *it's not a corporate proposal.*

- Simplify the sales process
- Increase perceived value
- Reduce pricing friction
- Help serious clients decide faster
- Use it after discovery calls
- Use it during proposal follow-up
- Use it as a pre-call authority asset
- Do not over-customize

stop reinventing your proposal every time.

simple closes better.

THE TEMPLATE · 6 SECTION STRUCTURE

<p>1 The Executive Summary <i>show you understand the real problem.</i></p> <ul style="list-style-type: none"> → Open with the business challenge, not deliverables → Name the financial pressure in plain language → Identify the operational risk they're carrying → State the desired outcome of the engagement <p>WHY IT MATTERS Positions you as a strategic operator — not a service vendor.</p>	<p>2 The Financial Priorities <i>clarify what actually needs attention.</i></p> <ul style="list-style-type: none"> → Cashflow forecasting → Profitability visibility & margin analysis → Reporting structure & oversight → Only list priorities tied to their actual pain <p>WHY IT MATTERS Too many deliverables lower perceived value. Focus increases authority.</p>
<p>3 The CFO Engagement Structure <i>show how you actually work.</i></p> <ul style="list-style-type: none"> → Monthly executive review → Forecasting cadence & financial reporting → Strategic finance guidance + decision support → Frame leadership — not hours, tasks, or "support" <p>WHY IT MATTERS Premium retainers pay for clarity and decision confidence — not admin work.</p>	<p>4 The Expected Outcomes <i>anchor value around business impact.</i></p> <ul style="list-style-type: none"> → Stronger cashflow visibility → Faster financial decisions, cleaner growth planning → Operational efficiency improvements → Reduced financial uncertainty <p>WHY IT MATTERS Business owners buy outcomes — not finance activities.</p>
<p>5 Pricing Presentation <i>present one number. then stop talking.</i></p> <ul style="list-style-type: none"> → Investment: \$5,000/month. One clear number. → Position it as financial leadership — not a service fee → Do not justify, itemize, or over-explain → Do not negotiate against yourself <p>WHY IT MATTERS Complex pricing weakens authority. Simple pricing feels executive-level.</p>	<p>6 Next Steps <i>reduce friction create confidence.</i></p> <ul style="list-style-type: none"> → Onboarding process & kickoff timeline → Information needed from the client → Expected meeting cadence → Keep it short and operational <p>WHY IT MATTERS A clear next step creates confidence — not overwhelm.</p>

THE BIGGEST PROPOSAL MISTAKES

Most CFO proposals lose **authority**, not price.

WEAK PROPOSALS

- ✗ Sound like bookkeeping
- ✗ Over-explain deliverables
- ✗ Justify pricing emotionally
- ✗ Overwhelm with detail
- ✗ Focus on tasks, not impact

STRONG PROPOSALS

- Simplify the decision
- Clarify the priorities
- Position executive authority
- Anchor on business outcomes
- Present one clear number

the best CFOs don't sell harder.

WHY THIS MATTERS

Clients decide if you feel *expensive* long before pricing.

WEAK PROPOSALS CREATE:

- Slower decisions
- Price pushback
- Ghosting after the call
- Lower retainers
- Confused clients

STRONG PROPOSALS CREATE:

- Clarity
- Confidence
- Authority
- Faster closes
- Premium retainers

structure closes. selling doesn't.

WANT HELP APPLYING THIS TO YOUR OFFER —

we'll show you what's weakening your positioning.

Apply for a Fractional CFO Strategy Session

DESIGNED SPECIFICALLY FOR:

- Fractional CFOs ready to raise retainers
- Advisory-focused accountants positioning beyond bookkeeping
- Operators moving from hourly work to executive-level pricing

Book a Free Strategy Session →

We'll identify what's weakening your positioning, where your proposals lose authority, and how to improve conversion without discounting or chasing clients.

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