Klarstig

Financial Services Consulting Estimate

Prepare a preliminary estimate by recording the scope, assumptions and cost basis. An estimate is subject to confirmation after the scope and conditions are checked.

Contact and reference

Organization using this document

Your name or contact reference *

Email for a reply if needed

Information for this document

Work to be estimated *

Expected deliverables *

Estimated billable units *

Unit basis such as hours or items *

Estimated rate per unit *

Currency *

- ☐ USD
- ☐ EUR
- ☐ GBP
- ☐ CAD

☐ Other

Other currency code if selected

Other estimated costs

Assumptions and exclusions *

Expected start and duration

Specific details

Business area and consulting objective

Complete when relevant to this request.

Deliverables milestones and access to relevant information

Operating context

Service area and case reference

Complete when relevant to this request.

Authorized reviewer supporting information and handling restrictions

Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- No payment is taken by default. Online payment needs a connected payment account and is configured separately.
- Some questions become required only after certain answers. The printable version shows every question.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched

on until you configure them.

Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

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