FINANCE TEAM'S CLIENT EXPECTATIONS

We CAN Help Clients

- Build financial models
- Develop financial projections
- Evaluate financial health (leverage, human capital)
- Provide educational resources
  - Financial record maintenance tips
  - Simple financial templates
  - Business plan template

We CANNOT Help Clients

- Craft business plans
- Develop ideas with or for you
- Complete taxes

Time Frame of Projects

- As laid out on our FBDC menu, the length & specifics of projects vary.
- Clients will hear from our team upon the request of services/beginning of an assignment.
  - Basic client information (name, contact info, type of business, service interest, etc) will be requested.
- If additional financial information is needed, clients will be contacted by their assigned FBDC Finance team members.
  - If clients choose to not disclose their financial numbers, we cannot complete financial analyses.
- Clients will hear from/meet with their assigned FBDC Finance team members upon completion of project deliverables.
- Once completion of a project is confirmed with a client, our team will send a wrap-up email.
  - Clients will be asked to complete a feedback survey (which we greatly appreciate clients to fill out for our own future records).
- If at any time we are unable to assist a client, we will direct them towards:
  - our FBDC research reports that we have compiled and/or
  - other semi-government/reliable financial sources that best fit their needs.

Questions or Interested in Working with Us?

Contact: fbdc@fordham.edu