

BACK OFFICE SOLUTIONS, LLC

Outsourcing Work Request Form

General Information: Please fill out one form per client

Planner Name:	_____
Client Name:	_____
Work Request Date:	_____
Project Due Date:	_____
Work Type (Circle One):	Data Input Data Analysis Plan Writing Data Conversion Software Demo Service
Financial Software (Circle One):	Integrate Money Tree NaviPlan Ext. Money Guide Pro

Analysis/Plan Writing Description:

Plan Writing: Specific areas to include:

Or Comprehensive Planning

Fee Estimate for Above Work:

(This is an estimate only. If the plan has unforeseen complexities, the fee can be higher. When our actual fees meet the estimated fees, we will notify the planner of the situation.)

Data Entry
X hours for analyses and scenarios
X hours for plan writing
Total estimated: