

ESTIMATE

Estimate # [0001]

Date [MM/DD/YYYY]

Valid until [MM/DD/YYYY]

Your reference / PO [optional]

ENGAGEMENT

[The engagement in one line]

[How long, and when each phase lands]

[Start: what needs to be in place first]

[Phone or email]

DEPOSIT TO BEGIN
[Amount — what it books, and when the balance is due]

WHAT'S INCLUDED
[The deliverables, the meetings, the data you'll work with — and what isn't: implementation, extra sites, work outside the question asked.]

HOW TO PAY

[Deposit invoiced at kickoff; the balance at delivery, net 15 or net 30. ACH, card or check.]

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