

Consultancy Proposal: Financial Certification and Pitch Document for Amari Dairy Cooperative

To: The Management Board, Amari Dairy Cooperative

From: Heritage Partners

Date: 30 July 2025

Subject: Proposal for Financial Certification and Investor Pitch Document Advisory Services

1. Introduction

Heritage Partners is pleased to submit this proposal for comprehensive financial and strategic advisory services tailored to support Amari Dairy Cooperative's growth and governance objectives. We understand your need for credible financial certification, compelling investor materials, and actionable management insights.

2. Scope of Services

We will deliver the following within **two (2) weeks** of project commencement:

Core Deliverables:

- **A. Certification of Accounts:**

- Independent review and certification of financial statements since the business started mainly focusing on the latest financial year.
- Verification of compliance with relevant accounting standards (IFRS).
- Issuance of a formal **Certification Report**.

- **B. Investor Pitch Document:**

- Development of a compelling pitch deck highlighting Amari's:
 - Market position, competitive advantages, and growth trajectory.
 - Key financial performance indicators (KPIs) and historical trends.
 - Formal company valuation (leveraging prior work completed).
 - Investment opportunity and use of funds.

Bonus Deliverable (Included):

- **C. Management Advisory Letter:**
 - Strategic assessment of operations, market positioning, and growth opportunities.
 - Identification and mitigation plan for key financial, operational, and market **risks**.
 - Evaluation and recommendations for strengthening internal **controls** and governance.

3. Methodology

- **Phase 1 (Days 1-3):** Data gathering, stakeholder interviews, and account verification.
- **Phase 2 (Days 4-10):** Draft development (Certification Report, Pitch Deck, Management Letter).
- **Phase 3 (Days 11-14):** Client review, refinement, finalization, and delivery.

4. Timeline & Deliverables

| Deliverable | Deadline |
|---|------------------------------------|
| Project Commencement | Upon Proposal Acceptance + Payment |
| Draft Deliverables | Day 10 |
| Final Certified Accounts, Pitch Deck & Management Letter | Day 14 |

5. Investment & Payment Terms

- **Total Fee: MK 800,000** (Malawian Kwacha).
- **Payment Schedule:**
 - **MK 300,000:** Due upon acceptance of this proposal.
 - **MK 500,000:** Due upon delivery and acceptance of all final deliverables (Day 14).
- **Payment Method:** Cheque or Bank transfer to Alfred Kazembe National Bank of Malawi Account 1009758883 Gateway Mall Branch.

6. Assumptions

- Amari Dairy Cooperative will provide timely access to financial records, management, and necessary data.
- Key stakeholders will be available for brief consultations through phone calls and emails.
- Feedback on drafts will be provided within 24-48 hours.

7. Confidentiality

All information provided by Amari Dairy Cooperative will be treated as strictly confidential and used solely for the purposes of this engagement.

8. Next Steps

To proceed, please:

1. Sign the acceptance section below.
2. Return a copy of this proposal.
3. Arrange payment of the initial fee (MK 300,000).

Upon receipt, we will immediately commence work to meet the 2-week deadline.

Acceptance by Amari Dairy Cooperative:

We authorize Heritage Partners to commence work as described in this proposal.

Authorized Signature: _____

Name: _____

Title: _____

Date: _____

On behalf of Heritage Partners



Alfred Kazembe

Managing Partner - Heritage Partners

INVOICE #06/2025

From : Alfred Kazembe, Heritage Partners

Phone : 0999213388

Address : Capital City, Lilongwe

email : alfiekay08@yahoo.com

To : Amari Dairy Cooperative

Date : 30 July 2025

| Description | Amount |
|---|----------------|
| Amari Dairy Cooperative Limited Accounts Certification and Pitch Doc Creation - deposit | MWK 300,000.00 |
| Total | 300,000.00 |

Signature 

Account Details:

Account name : Alfred Kazembe

Account number : 1009758883

Bank : National Bank of Malawi

Branch : Gateway Mall