

# Financial Services RFI Template

## 1. Company Information

Company Name

Contact Person

Email

Phone

Address

## 2. Organization Overview

Brief Description of Your Company

Year Established

Number of Employees

## 3. Service Capabilities

Types of Financial Services Offered

Core Competencies

Industries Served

4. Experience & References

Relevant Experience

References (Name, Company, Contact Details)

5. Compliance & Certifications

Licenses and Regulatory Certifications

Security and Data Protection Measures

6. Pricing Model

Describe Your Pricing Model

## 7. Additional Information

Any Other Information

## 8. Acknowledgement

Name and Position

Date