

Proposal: Edwin Core Platform

Prepared for the City of Coachella

Prepared for	Lincoln Bogard, Finance Director, City of Coachella
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PRODUCT OVERVIEW

Edwin Core enables agencies to streamline financial operations and review cash and investment portfolios against benchmarks through automated workflows and reporting. For the City of Coachella, the initial deployment will focus on automated reconciliation, with the broader Edwin Core capability set available to the finance team throughout the engagement.

YEAR 1 FOCUS: RECONCILIATION

- Automated bank-to-GL reconciliation across operating and investment accounts
- ERP integration and reconciliation workflow configuration
- Deposit-in-transit identification, aging, and clearing logic
- Exception management with full audit trail and approval workflows
- Implementation, finance team training, and ongoing customer support

PRICING

Contract Year	List Annual Subscription Fee	Promotional Credit	Net Subscription Fee	Notes
Year 1	\$25,000	Six (6) months complimentary	\$12,500	Introductory pricing; net fee reflects six paid months. Pro-rata cancellation in Year 1.
Year 2	\$25,750	None	\$25,750	3% increase over Year 1 list price.
Year 3	\$26,523	None	\$26,523	3% annual inflation adjustment.

TIMELINE AND NEXT STEPS

1. This week: Internal review of this one-page proposal by the City
2. Next week: Edwin delivers the full documentation package, including detailed scope of work, security and compliance documentation, and municipal references
3. May 2026: Procurement and legal review
4. June 2026: Contract execution
5. July 1, 2026: Implementation kickoff and Year 1 engagement begins

We appreciate the opportunity to partner with the City of Coachella and look forward to delivering measurable value from day one.