

EDWARDS TAX & FINANCE SERVICES

Ongoing Financial Support Agreement – 2025

1. Support Scope

Ongoing support includes scheduled check-ins and periodic strategy updates. Services do not include unlimited access, emergency financial services, or on-demand financial advice.

All ongoing support services are educational and planning-based and do not constitute financial, legal, or investment advice.

2. Communication Policy

Communication occurs via scheduled meetings or agreed-upon email check-ins. Response time is within 1–2 business days.

3. Cancellation

Client may cancel after the initial three-month commitment period with written notice.

Client Name: _____

Signature: _____

Date: _____