

EDWARDS TAX & FINANCE SERVICES

Financial Planning Deliverables – 2025

Your Debt & Cash-Flow Planning Deliverables

Example Content

Depending on service selected, client may receive:

- Personalized debt payoff strategy tailored to your financial priorities
- Payoff timeline
- Refund allocation plan
- Monthly bill schedule
- Strategy notes and recommendations
- Follow-up check-ins (if applicable)

Deliverables are provided digitally unless otherwise stated. Deliverables are provided for planning and educational purposes and do not constitute financial, legal, or investment advice.

Contact Information

If you have questions about your financial planning deliverables or services, please contact:

Edwards Tax & Finance LLC

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