**Service Terms — Business Accounting, Financial Statement Preparation, and Bookkeeping**

**Scope of Services**

Blume Tax and Consulting (“the Firm”) will provide professional accounting and bookkeeping services to assist in maintaining accurate and timely financial records for your business. Services may include:

* Recording and classifying financial transactions into the general ledger.
* Reconciling bank, credit card, and loan accounts.
* Preparing trial balances and adjusting journal entries as needed.
* Assisting with accounts receivable and accounts payable tracking.
* Preparing periodic financial statements (income statement, balance sheet, cash flow statement) for management use.
* Advising on compliance with generally accepted accounting principles (GAAP) or other reporting frameworks, as appropriate.
* Assisting with year-end close procedures and coordination with tax return preparation.

**Service Terms — Individual Tax Preparation and Planning**

**Scope of Services**

Blume Tax and Consulting (“the Firm”) will provide professional services for the preparation and filing of your federal, state, and local individual income tax returns. Services may include:

* Preparing and filing annual Form 1040 (including Forms 1040SR or 1040NR, if applicable) and required schedules.
* Calculating estimated tax liabilities and payments.
* Preparing amended returns (Form 1040X), if requested.
* Providing tax planning strategies to minimize liabilities and identify savings opportunities.
* Advising on timing of income, deductions, and credits.
* Offering guidance on retirement contributions, withdrawals, and other tax-sensitive financial decisions.

This Engagement Letter confirms the terms of our professional relationship for the 2025 tax year.

Blume Tax and Consulting (“we,” “our,” or “the Firm”) agrees to provide tax preparation, accounting, payroll, and advisory services for you (“Client”) in accordance with professional standards and the limitations described herein.

**Service Terms — Tax Resolution and Representation**

**Scope of Services**

Blume Tax and Consulting (“the Firm”) will provide representation and support services related to federal and/or state tax authority matters, which may include:

* Responding to IRS or state tax notices.
* Representing you in audits, examinations, collections, and appeals.
* Preparing and submitting requests for penalty abatement, installment agreements, or Offers in Compromise.
* Assisting with innocent spouse relief and other relief programs as applicable.
* Advising on resolution strategies based on your specific circumstances.

These services require a signed Power of Attorney (IRS Form 2848 or state equivalent) to authorize the Firm to communicate with taxing authorities on your behalf.

**Service Terms — Business Tax Preparation and Planning**

**Scope of Services**

Blume Tax and Consulting (“the Firm”) will provide professional services for the preparation and filing of federal, state, and local business income tax returns, as applicable to your entity type (C Corporation, S Corporation, Partnership, LLC, or Sole Proprietorship). Services may include:

* Preparing and filing annual and quarterly tax returns.
* Calculating estimated tax liabilities and payments.
* Preparing supporting schedules, elections, and forms.
* Providing tax planning strategies to minimize liabilities and identify opportunities.
* Advising on entity structure and tax implications of business decisions.
* Coordinating with payroll, bookkeeping, and accounting records to ensure accurate reporting.

**Service Terms — Implementation, Deployment, and Coding Services**

**Scope of Services**

Blume Tax and Consulting (“the Firm”) will provide technical services to assist with the setup, customization, and operation of systems or software tools as agreed in writing. Services may include:

* **Implementation** – Installing, configuring, and integrating software or systems for business operations.
* **Deployment** – Launching applications, databases, or technical solutions in production or live environments.
* **Coding and Development** – Writing, testing, and maintaining scripts, automations, or custom code to support business processes.
* **Support** – Providing limited technical troubleshooting, adjustments, and updates as necessary during and immediately after deployment.