



april Tax Consulting - Scope of Services

Service Summary

april Tax Consulting provides on-demand tax expertise, connecting users with certified tax professionals for personalized, real-time tax guidance using our in-app questionnaire. Our one-on-one virtual consultations are designed to answer tax questions, offer tailored advice, and provide strategic tax insights.

Each consultation includes:

- An opportunity for personalized, one-on-one advice from a certified tax professional.
- Review of any documents the user uploads prior to the session.
- A post-session summary with key points discussed and actionable next steps.

Important: The consultation is a standalone session. It is not an engagement for tax preparation, projections, or filing. All advice and deliverables are provided during the session or in the follow-up summary. Further work, including communications or deliverables beyond the session, is not included. Users can book additional sessions as needed.

What's Included (Examples of Topics)

Topic	Details
Maximizing Deductions & Credits	Identifying eligible deductions (home office, self-employed expenses, etc.), education, energy, and childcare credits.
Quarterly Estimated Taxes (Guidance Only)	How to calculate and pay estimated taxes, avoiding penalties and underpayment issues.
Business Structure & Entity Selection	Guidance on LLC vs. S-Corp vs Partnership vs. Sole Proprietor for tax purposes, tax implications of changing entity types.
Tax Implications for Investments or Stocks	Stock sales, RSUs, crypto, capital gains, and tax advantaged accounts (e.g. HSA).
General Tax Planning & Strategy (No projections)	Income-shifting strategies, major life changes impact, and personalize tax deductions strategy.
Retirement Planning & Options	Tax benefits of SEP IRA, Solo 401(k), Traditional vs. Roth IRA, contribution limits and strategies for self-employed or W-2 workers.
Tax Return Review & Filing Help (Guidance Only)	Reviewing prior tax returns for common mistakes, helping clients understand forms, deductions, and filing positions.

What's Not Included (Example of Topics)

- Tax Preparation or Filing Services of any kind (federal, state, or local).
- Any consultation advice related to returns outside of individual federal and state income tax filings, including but not limited to:
 - Local/city tax returns (e.g., personal property tax).

- Sales tax, payroll tax, unemployment tax returns.
- Estate or trust tax filings (Form 1041).
- Nonprofit tax returns (Form 990).
- Non-resident returns (Form 1040NR).
- Returns for married filing separately in community property states.
- Complex international tax matters, including:
 - Foreign corporations, partnerships, or trusts.
 - Expatriate taxes, foreign tax credits related to complex structures.
 - FBAR/FATCA compliance.
- Legal or Investment Advice:
 - Entity legal formation, contracts, estate planning.
 - Stock selection recommendations, investment portfolio management.
- Highly Specialized or Unsupported Tax Topics, such as:
 - Cryptocurrency, mining businesses etc.
 - Multi-state complex apportionment for businesses.
 - Unsupported or obscure tax forms not typically used by individuals.



Summary of Expectations

- The consultation itself is the service.
- Clients receive expert advice during the session and a summary afterward.
- No tax preparation, ongoing support, or after-session deliverables are included beyond the summary.
- Users are welcome to book follow-up sessions if further guidance is needed.
- Experts will conduct a high-level review of the client's documents provided before the consultation to prepare for the session; however, they are not verifying the accuracy of the documents.