

Claude at the Desk

Your copy. Write on it. The model drafts. You redline. Nothing leaves without your name on the ritual.

Fieldstone Advisory

Montgomery County, Texas · Participant edition · keep this folder

AI drafts. Human review. Then send. We are not a CPA firm. We are not a law firm. Circular 230 did not get an AI exception.

BEFORE WE START

Name the artifact you will take home

One line. One owner. One send-by date. Fill this before the first demo.

ARTIFACT

OWNER

SEND-BY DATE

01 · No live SSNs, EINs, bank numbers, or full legal names in the model. Redact first.

02 · Consumer chatbots stay off live files. Team seats only.

03 · A draft is not a return. Circular 230 did not get an AI exception.

04 · The red-pen ritual is required before anything leaves the room: facts, cites, numbers, tone, PII, would I sign.

05 · Nothing emails itself. The human who signs owns it.

06 · Each person names one artifact they will take home live. That is the close of the day.

Red-pen before send

1. Facts

Is every name, date, and job in the source — or marked [TO CONFIRM]?

2. Cites

Did it invent a Code section, Pub., or court? If you cannot find it, it goes.

3. Numbers

Do dollars, months, and due dates match the file? Sample figures stay marked.

4. Tone

Would this firm send it? Short sentences. No hype. No apology for having a calendar.

5. PII

Any identifier the model should not have seen? Redact. Do not paste it back.

6. Sign

Would I sign this? If not, it does not leave.

SAMPLE FILE — DE-IDENTIFIED

Twelve Oaks GC (de-identified)

General contractor · Conroe, Texas · Twelve in the field

QBO eight months behind. Progress billing and retainage. Jobs never tagged. Owner still prices from last year's gut. 2025 extension still open.

Do not invent an EIN, a bank, a legal name, or a fee.

TODAY'S EIGHT

- ☐ Cold outreach
- ☐ Discovery outline
- ☐ Decline
- ☐ Document request
- ☐ QBO cleanup sequence
- ☐ Friday snapshot
- ☐ Texas calendar
- ☐ 1040 organizer email

EXERCISE 01 · SOURCE-CONTRACTOR

Cold outreach

90–140 words to a 12-crew GC whose QBO is eight months behind. Offer 30 minutes. Name job cost, draws, retainage.

DRAFT NOTES

RED-PEN — WOULD I SIGN THIS?

EXERCISE 02 · SCREEN-DISCOVERY

Discovery script

30-minute outline. Two closes: quote a defined project, or decline cleanly.

DRAFT NOTES

RED-PEN — WOULD I SIGN THIS?

EXERCISE 03 · SCREEN-DECLINE

Not-a-fit decline

~80 words. Direct. Name the mismatch. No apology for having a calendar.

DRAFT NOTES

RED-PEN — WOULD I SIGN THIS?

EXERCISE 04 · ONBOARD-DOCS

Document request + engagement

Punch list grouped now / this week / as-available. Fees as [BLANK].

DRAFT NOTES

RED-PEN — WOULD I SIGN THIS?

EXERCISE 05 · ONBOARD-QBO

QBO cleanup plan

Numbered sequence for eight dark months. Unknowns flagged. No invented fee.

DRAFT NOTES

RED-PEN — WOULD I SIGN THIS?

Friday job-cost snapshot

One page. Cash, AR, unbilled draws, retainage, job margin. Sample figures marked.

DRAFT NOTES

RED-PEN — WOULD I SIGN THIS?

EXERCISE 07 · IMPLEMENT-CALENDAR

Texas filing calendar

Next 12 months, only what applies. Firm-owned vs client-owned.

DRAFT NOTES

RED-PEN — WOULD I SIGN THIS?

1040 organizer email

Extension still open. Wall 15 Oct 2026. Drop-dead that leaves review time.

DRAFT NOTES

RED-PEN — WOULD I SIGN THIS?

Copy into a Team seat. Not a consumer bot.

P01 • Voice block

You are the drafting desk for a bookkeeping and tax-preparation practice.

Voice: calm, specific, short sentences. No hype, no emoji, no exclamation points.
Never invent credentials, filing dates, Code sections, or dollar amounts.
Never present a draft as filed advice. A human will review before anything is sent or filed.
Do not add a preamble. Output only the artifact.
If a fact is missing, write [TO CONFIRM] rather than guessing.
Redact: no SSN, EIN, bank account, or full legal name unless the user supplied a fictional one.

P02 • Cold contractor note

Write a cold note to this contractor. 90–140 words.
Offer a 30-minute discovery, not a pitch. Name job cost, draws, retainage, the Friday argument.
Invite a yes or a no. If catch-up is obvious, the monthly close comes after a defined catch-up project.
Client: [name], [company], [city, Texas]. Situation: [paste].
Sign as [firm]. Do not claim CPA, EA, or attorney unless that is true.

P03 • Not-a-fit decline

Write a decline email. ~80 words. Be direct. Name the mismatch without insult.
If a better home exists (a mill, a CPA firm, an attorney), say so in one line.
Do not apologize for having a calendar.
Mismatch: [they want \$99 dump-and-file / they need attest / they will not give documents].

P04 • Document request

Write a document request grouped: need now, this week, as available.
Contractor: draws, job list, subs, bank, payroll, prior return, QBO access.
Do not ask for everything in the universe. Client: [paste niche + situation].

P05 • QBO cleanup sequence

Write a QuickBooks Online cleanup sequence for this file.

Jobs vs classes vs locations, bank feeds, opening balances as [TO CONFIRM], who owns the subscription.

Flag unknowns that change the quote. End with what "done" means in one sentence. Do not invent a fee.

P06 • 1040 organizer email

Write a client email requesting organizer items for an individual return on extension.

Tax year 2025. Wall date 2026-10-15. Drop-dead [2026-09-29] to leave review time.

Plain English. Nothing is filed until a human at this firm has reviewed the draft.

AFTER THE ROOM

Seven days

☐ Day 0

Seats provisioned. Voice block (P01) saved as a Project instruction. 7216 consent names the vendor.

☐ Day 1

Two Skills: outreach and document request. One redacted sample file in the Project.

☐ Day 2

WISP clause and engagement insert in the firm's own words. Not ours copied.

☐ Day 3

First live artifact under review. Not sent. Red-pen on paper or in the doc.

☐ Day 5

Second artifact. Pair-redline. Catch one invented cite on purpose.

☐ Day 7

One approved send. Owner named. Send-by date on the calendar.