

Four desks. One steward. Sign this.

18 September 2026. 15 October 2026 · 27 days. Four desks.

One steward. Ten weekly hours, Central Time. Invoice after the call. No card.

Fieldstone Advisory

Montgomery County, Texas · Fieldstone Advisory · Montgomery County

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.

SYNOPSIS

What we held

Named floors: contractor \$1,500 / mo, kitchen \$1,200, extension \$850, estate \$1,500.

Founding Friday Close \$6,500 sits in the ProAxis catch-up band, not the 2–3× capacity ceiling.

Tax-season surcharge hits project work inside a wall. Not the monthly retainer. The 18% is already in the year.

Inside 14 days the wrap is off. Inside 7 days we decline.

Do not match Bench or Pilot. Do not clone Bookkeeper Launch. Do not file from a weekend dump.

Accounts, entity count, AR/AP, and payroll size now move both our hours and the ProAxis 0–12 score.

DESKS

One steward

Ten weekly hours, Central Time. Hours do not stack.

Jobsite hours first. Cap three Extension files. Estate is an intro, not a 1041 rescue. Kitchen does not get sales hours until six Trade retainers close on Friday without you.

Friday Close · Contractor / job cost · \$1,500 / mo · founding wrap \$6,500

Kitchen Week · Independent restaurant · \$1,200 / mo

The Extension File · 1040 on extension · \$850 · +20% inside 30 days of the wall

The Estate File · Texas estate / probate books · \$1,500

THIS FORTNIGHT

Who can cut a check

#DESK	DEPOSIT	NOTE
1 Friday Close	Yes, if the name is warm	Transition \$1,000 is the easy invoice. \$6,500 founding is the one that matters. Franchise of the practice.
2 Extension File	Highest odds this fortnight	Cap two this fortnight, not three. Eight hours max through 15 Oct. CPA-referred. \$1,050 already in force.
3 Estate File	Only if letters are issued	One attorney text. \$1,500 inventory/basis. Not a will. Wills & Whiskey is their room.
4 Kitchen Week	No	Fair price, wrong hours. Ranking it creates work we will turn down.

Twenty hours

BLOCK	HOURS	USE
Friday Close hunt / close	10	Mon–Thu 6:45–8:15 counters. Two sit-downs.
Extension delivery or named outbound	8	Fill one, maybe two files with a deposit.
Estate	2	One attorney or executor text. No seminar.
Kitchen / Chamber awards / YouTube	0	Parked.

QUOTE

Flags now on the file

ProAxis scores 0–12 inside a tier. These four used to leave the score as a floor. They now move our hours and their band.

Accounts to rec. Quote field. +1 at 3–5, +2 at 6+. Extra 0.4 hours each above two.

Entity count. Quote field. ≥ 2 forces the complex tier and the multi-entity premium.

AR / AP. None / AR / AP / both. Score +1 or +2. Extra hours on the file.

Payroll size. None, owner, 1–5, 6–20, 21+. 6–20 is +2 on the score and \$100 on the monthly.

I C P

How they actually search

Friday Close

They type the thing that broke: retainage in QuickBooks, WIP that does not match, a job that ate the truck payment. Montgomery County is still a permit machine. Production homes cooled; custom and remodelers did not.

Kitchen Week

Toast sales tax, DoorDash facilitator, mixed beverage 6.7%, food cost. Demand exists. Ranking it this fortnight creates a lead we will reject.

Extension File

K-1 not received. File 1040 without K-1. October 15 deadline. They already filed 4868. Partnership/S-corp furnish date was 15 Sep. They want one return filed, not a relationship.

Estate File

Montgomery County probate inventory 90 days. Letters Testamentary, what next. Date-of-death bank balance. They have a lawyer or will get one. They will not pay counsel to rec the estate checking account.

SEO

Last 60 / next 30

Live Trends did not return a series. Seasonal logic plus 2026 content velocity. Do not fight Bench, Pilot, or "bookkeeping services."

KEYWORD	WHEN	DESK
file 1040 after extension	Now	Extension File
still waiting on K-1	Now	Extension File
file 1040 without K-1	Now	Extension File
October 15 tax deadline 2026	Now	Extension File
4868 already filed now what	Now	Extension File
construction bookkeeping Montgomery County	Now	Friday Close
job costing QuickBooks contractor Texas	Now	Friday Close
retainage QuickBooks	Now	Friday Close
WIP schedule contractor	Now	Friday Close
progress billing bookkeeping	Now	Friday Close
catch-up bookkeeping contractor Texas	Now	Friday Close
painter bookkeeping Conroe	Now	Friday Close
AIA billing bookkeeping	Later	Friday Close
bonding packet bookkeeping contractor	Later	Friday Close
Montgomery County estate inventory 90 days	Now	Estate File
Letters Testamentary executor bookkeeping Conroe	Now	Estate File

KEYWORD	WHEN	DESK
date of death bank balance Texas	Now	Estate File
Form 1041 Texas estate	Now	Estate File
Texas mixed beverage tax bookkeeping	Later	Kitchen Week — paused
Toast sales tax Texas	Later	Kitchen Week — paused
DoorDash marketplace facilitator bookkeeping	Later	Kitchen Week — paused

Three pages. Then stop.

Extension File. Before 30 Sep. Still waiting on a K-1. \$850, \$1,050 inside 30 days, cap, CPA-referred, 4868 already on file. Noindex after 15 Oct.

Friday Close. Before 30 Sep. Job-costed books for Texas contractors. Geo in the title. \$1,000 then \$6,500 then \$1,500/mo. This page still has to work in November.

Estate File. Before 30 Sep. 90-day inventory, date-of-death books, 1041. Statutory Probate Court No. 1, 210 W Davis. Not legal advice in the H1.

READINESS

Assessment

ITEM	STATUS	NOTE
Named offers and floors	Ready	Transition \$1,000 · Friday Close founding \$6,500 · Extension \$850 · Estate \$1,500.
Quote math + ProAxis score	Ready	Volume, accounts, payroll size, AR/AP, entities, industry. A Conroe painter with a crew scores 7/12. Kitchen 8/12.
Print packs	Ready	Facilitator, workbook, Friday Close course, quote sheet, officer sign-off, teaching hours, this review.
Teaching hours × 4 desks	Ready to run	Hour 1 is the policy. Hours 2–3 have 16 demo prompts. Red-pen card and 7-day install print with the hour pack.
Extension File this fortnight	Valve	Take at most two. CPA-referred. Organizer by 1 Oct. Drop-dead 29 Sep. Inside 7 days of the wall we decline.
Friday Close / Transition	Now	Supply-house mornings. Two sit-downs. One founding wrap if the name is real. Ten seats consume the steward.
Kitchen Week / Estate File	Pause / pipeline	Kitchen: zero sales hours. Estate: one intro, no 13-day 1041 heroics.
Domain + GBP	Officer	Buy the domain. Claim Google Business Profile. NAP identical. A preview URL must not index.
Three pages before 30 Sep	Blocked on domain	Extension File, Friday Close, Estate File. No kitchen. No 4868 how-to. No AI bookkeeping sludge.
YouTube API upload	Hold	Studio until the audit. Two videos a week, human on camera. Headless JSON is the export, not the publisher.
First deposit	Open	Invoice after the call. Hours do not stack. This fortnight: one or two Extension deposits, one Transition, one wrap if real.

NEXT

While the wall is 27 days out

Today · Fri 18 Sep. Invoice every 4868 file already in reach. \$850, or \$1,050 rushed. Fifty percent to start. Decline if documents are not in within seven days. Remaining Extension seats: two.

Mon 21 Sep · 6:45 a.m.. ABC Supply, 938 S Frazier, Conroe. Eight contractor cards. Two Friday Close sit-downs this week. Transition \$1,000 due at signature.

This week. One founding wrap on a named crew, 3–8 months dark. \$6,500 in the room, not a proposal PDF. Text five trades you already know: ten seats, hours do not stack.

Tue 22 Sep · 5–7 p.m.. Woodlands Chamber Meet the New Members only if the list has trades. If it is insurance and wellness, keep the 7 a.m. counter.

Fri 25 Sep. Skip the Chamber annual meeting. Awards do not invoice. Hours stay on the counter or on a file.

Mon 28 Sep. Twenty minutes at the Hole In The Wall Drywall ribbon cutting with a Transition invoice, then leave.

Tue 29 Sep. Drop-dead for new Extension files. One text to probate counsel: inventory/basis books, \$1,500, not a will. Do not sit Wills & Whiskey as a closer.

Kitchen, YouTube, generic SEO. Pause. Revisit Kitchen when six Trade retainers close on Friday without you.

Refuse

Kitchen Week selling, Chamber annual as a floor, Wills & Whiskey as a closer, GHBA Galveston, matching Bench.

Any 1040 not already on a 4868. Any Extension File inside 7 days of 15 Oct. Any will dressed up as an Estate File.

A third Extension File, or any Estate File, that pushes Extension + Estate above eight hours through 15 Oct.

SIGN

Officer

I have read the holds, the four desks, the flags now on the quote, the teaching-hour pack, the SEO pause list, and the 13-day calendar. Domain and GBP are mine. The steward invoices after the call.

Name · date · signature
