

TEACHING HOURS

Three hours. Four desks. One steward.

Agenda, slide titles, trainer notes, red-pen card, 7-day install, and the demo prompts the room actually runs.

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.

ONE STEWARD

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

Ten Transition seats. Invoice after the call. No card on the desk.

Trade, Kitchen, Extension, Estate. The steward quotes, red-pens, and sends. The model drafts.

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.

HOUSE RULES

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

Consumer chatbots stay off live files. Team seats only.

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

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

Nothing emails itself. The human who signs owns it.

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

Before it leaves

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.

CLOCK

The three hours

0:00–1:00

Hour 1 — The desk, not the model

Each person can name their desk and the one artifact they will take home.

Slides: House rules · Four desks / one steward · Circular 230 in one sentence · Red-pen card · Decline is a product

Write the eight artifacts on the board. Collect the one-artifact promise before the first demo.

Four desks, one steward. If they cannot name their desk in one sentence, they are not in the room yet.

Circular 230 in one sentence: the practitioner who signs owns it. OPR did not add an AI exception.

Leave the red-pen card on the wall. Nothing emails itself.

1:00–2:00

Hour 2 — Produce under a clock

A draft exists. It has been red-penned. It has not been sent.

Slides: Cold note · Document request · QBO cleanup sequence · Friday snapshot · Pair red-pen

Cold note first, decline second. Seven minutes, then stop — even if it is ugly.

Pair red-pen out loud: facts, cites, numbers, tone, PII, would I sign.

Do not type for them. Walk. Catch one invented cite on purpose.

2:00–3:00

Hour 3 — The file in front of you

Owner, send-by date, and the artifact named out loud.

Slides: Twelve Oaks GC · Kitchen week · Extension wall · Estate inventory · 7-day install · The promise

Twelve Oaks stays de-identified. No live client on the screen.

Swap the sample to Kitchen / Extension / Estate only if that is the room you booked.

Each person says the artifact, the owner, the send-by date. That is the close.

FRIDAY CLOSE

Contractor / job cost

\$1,500 / mo · founding wrap \$6,500

Job-cost chart of accounts

You are the Friday Close desk. Redacted QBO export, 8 months dark, progress billing and retainage, jobs never tagged. Draft a 12-account job-cost chart. Do not invent an EIN or a legal name. Mark every figure [TO CONFIRM].

WIP snapshot

From the tagged jobs, draft a one-page Friday WIP: job, billed, cost, retainage, cash in. If a job has no tag, list it under Untagged. Do not net retainage into revenue.

Decline the mill

A painter wants \$250/mo because Bench is \$399. Write the decline. Named floor is \$1,500. Catch-up wrap is \$6,500 if 3–8 months dark and on calendar. Invoice after the call. No card.

Intake flags

Quote out loud: 300 txns, 4 accounts, AP-heavy, payroll 6–20, one LLC, job cost, 8 months dark, on calendar. Named floor \$1,500. Founding wrap \$6,500. Score 7/12. Do not say 2–3× monthly as the price.

KITCHEN WEEK

Independent restaurant

\$1,200 / mo

Daily settlement

Kitchen Week desk. 600 txns, 5 accounts, Toast plus one card. Draft the weekly rec: batch, tips, merchant fees. Gross vs net is the failure. Do not invent a location name.

Tip recode

Tips posted as sales. Write the recode sequence for 8 messy months. Payroll 12 employees. Mark [TO CONFIRM] on every dollar.

Week-close email

Friday 4pm. Owner gets three numbers: food cost, labor, cash. Four sentences. No dashboard speech.

Intake flags

600 txns, 5 accounts, AP-heavy, payroll 12, simple inventory, one entity, restaurant, 8 months messy. Score 8/12. Band \$850–\$1,100 / month of backlog. We do not sell Kitchen hours this fortnight.

THE EXTENSION FILE

1040 on extension

\$850 · +20% inside 30 days of the wall

Wall calendar

Today is 18 September 2026. Wall is 15 October. Write the 27-day file plan. Drop-dead 29 September. Inside 7 days we decline. Do not file from a weekend dump.

Organizer

Draft the 1040 organizer email for a contractor on extension. W-2, 1099-NEC, K-1 maybe. Redact. Ask for the QBO snapshot and last filed return. Do not estimate tax due.

Rush quote

File walked in 28 days from the wall. Named $\$850 \times 1.20 = \$1,050$. Monthly if they later buy a close does not pick up the surcharge. Two sentences plus the invoice line.

THE ESTATE FILE

Texas estate / probate books

\$1,500

Inventory letter

Estate File. Montgomery County. Apartment personal property, life insurance named, no EIN invented. Draft the inventory request to the executor. Texas. Do not give legal advice.

Date-of-death books

Open a date-of-death cash ledger. Bank, cash, known bills. Mark every number [TO CONFIRM]. Separate the estate from the heir's 1040.

What we will not do

Write the decline for a will contest. We keep the books. We do not litigate capacity. Four sentences. Point them to counsel.

INSTALL

Seven days after the room

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.

