TYGART MEDIA FIELD SHEET · CLAUDE SERIES

Claude for Accountants & Finance Teams — a Tygart Media field sheet

Financial narratives, complex Excel formulas, close SOPs, and Team/Enterprise data privacy.

Verified 2026-11-13 against Anthropic official docs · Guide: tygartmedia.com/claude-accountants-finance/ · Official Anthropic: claude.com/solutions/financial-services

DIRECT ANSWER · VERIFIED 2026-11-13

CPAs & finance teams leverage Claude for management commentary, Excel formulas, close checklists, and client letters under strict CPA review (claude.com/solutions/financial-services). Avoid client data on Free ($0); use **Team Standard ($20 annual / $25 monthly)**, **Team Premium ($100/$125)**, or **Enterprise ($20/seat + API)**.

1. Four Finance Workflows Built for Immediate ROI

- **Financial Narrative & Board Decks:** Turn clean variance tables into crisp executive commentary for leadership and investors.
- **Formula Engineering:** Generate complex multi-condition lookups, aging buckets, and cash-flow model logic from plain English.
- **Close & Audit Documentation:** Convert messy tribal month-end steps into auditable internal control checklists.
- **Client Education Letters:** Explain quarterly changes, deductions, or notice steps clearly — then review every figure manually.

2. Strict CPA Supervision Rules

- **Not a Licensed CPA:** Never rely on unverified outputs for tax positions, GAAP treatment, or audit sign-off.
- **Redact Identifiers:** Strip EINs, account numbers, and bank routing details unless governed by Enterprise retention contracts.

Verified Claude Plan & Pricing Snapshot (Verified 2026-11-13)

Plan Tier	Verified Cost (2026-11-13)	CPA / Finance Suitability	Governance & Privacy
Free	$0	Synthetic/redacted formula testing only	5 Projects; NOT for confidential client financials
Team Standard	$20/seat/mo annual / $25 monthly	2–150 seats; shared close & letter Projects; M365/Excel helpers	SSO, domain verification, central billing, **no training default**
Team Premium	$100/seat annual / $125 monthly	5× Standard capacity for heavy tax-season / FP&A analysts	Same workspace; mix-and-match seats with Standard
Enterprise	$20/seat annual + API usage (20+ min)	Multi-office firms & regulated finance controllers	SCIM, audit logs, compliance API, RBAC, custom retention, IP allowlist

Verified 2026-11-13. Anthropic Enterprise also offers a HIPAA-ready offering where healthcare/benefit data applies. Copy CPA skills at tygartmedia.com/claude-prompts-accountants/.

Next Steps & Implementation Checklist

- ■ Restrict client financial drafting to Team or Enterprise seats with SSO and no-training defaults.
- ■ Keep Claude's math verified: compute figures in Excel/ERP and use Claude for formula structure & prose.
- ■ Deploy the 4 CPA Skills from tygartmedia.com/claude-prompts-accountants/ inside shared Team Projects.

CANONICAL LINKS & PRICING HUB

Full Interactive Guide: https://tygartmedia.com/claude-accountants-finance/ | **Pricing Hub:** tygartmedia.com/claude-ai-pricing/ | **Anthropic Official:** https://claude.com/solutions/financial-services