TYGART MEDIA FIELD SHEET · CLAUDE SERIES

Claude Prompts for Accountants (CPAs) — a Tygart Media field sheet

Four SKILL.md modules (client email, tax explainer, engagement letter, IRS notice triage) + current model & privacy rules.

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

DIRECT ANSWER · VERIFIED 2026-11-13

Four CPA `SKILL.md` modules (Client Emails, Tax Explainers, Engagement Letters, IRS Notice Triage) run on Free through **Ultra ($200)** and **Team/Enterprise** when Skills & code execution are enabled (claude.com/solutions/financial-services). Default to **Sonnet 5.5** daily and **Opus 5.5 / Fable 5.2** (1M context) for heavy review; redact client PII on non-Team/Enterprise plans.

1. Four CPA Skills + Books for Bots Reference Stack

- **CPA Client Email + Tax Explainer:** Translates notices, filing statuses, and payment terms into calm plain-English drafts.
- **Engagement Letter + IRS Notice Triage:** Produces scoped engagement drafts and 3-part notice summaries (Plain English, Severity, Next Steps).
- **Three Firm Books:** Firm Context Sheet, Client Communication Standards, and 25-FAQ Reference inside a shared Project.

2. Strict Tax & PII Boundaries

- **Licensed CPA Review Mandatory:** Never send AI-drafted IRS correspondence or tax guidance without partner verification.
- **Redact Before Prompting:** Strip SSNs, EINs, and bank account numbers — insert exact identifiers manually post-draft.

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

Skill / Plan Role	Verified Support & Price	Recommended Model	CPA Confidentiality Rule
Free / Pro / Max / Ultra	Free $0 (5 Projects) · Pro $20 · Max $100 · Ultra $200	Sonnet 5.5 (daily) · Opus 5.5 / Fable 5.2 (heavy)	Synthetic/redacted examples ONLY — never upload EINs/SSNs cleanly
Team Standard / Premium	Std $20 ann / $25 mo · Prem $100/$125 (5× Std)	Shared org Skills (`Org settings -> Policy`)	Central billing, SSO, **no default model training**
Enterprise (Multi-Partner)	$20/seat/mo annual + API usage (20+ min)	1M context across Fable 5.2, Opus 5.5, Sonnet 5.5	SCIM, audit logs, compliance API, RBAC, custom retention
4 CPA Skills + 3 Books	Included in workflow pack (Free on guide)	Skills load dynamically; Projects store Firm Context	All IRS notice drafts require licensed CPA verification

Verified 2026-11-13. Pair Skills with firm close/Excel workflows at tygartmedia.com/claude-accountants-finance/.

Next Steps & Implementation Checklist

- ■ Confirm Code execution & Skills are enabled in Settings -> Capabilities (or Org Policy on Team).
- ■ Upload redacted Books for Bots PDFs; keep SSNs/EINs strictly offline outside prompts.
- ■ Deploy Team Standard ($20 annual/seat) or Enterprise across preparers via tygartmedia.com/claude-ai-pricing/.

CANONICAL LINKS & PRICING HUB

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