FREE GUIDE · LAW & ACCOUNTING FIRMS

101 AI Prompts for *Law & Accounting* Firms

Copy, paste, review.

Free from José Palacios · CorpusProof

10 sections · client work, research, tax, billing and growth

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READ THIS FIRST

3 rules before you paste anything

These prompts save hours. They only stay safe if you follow three rules, every time, with every tool.

1 Remove names and IDs.

Before you paste, replace client names, addresses, ID and tax numbers, account numbers and anything else that identifies a person or company with neutral labels: Client A, Company B, [AMOUNT]. If it would hurt to see it in a headline, it does not go in the prompt.

2 Use a business plan that does not train on your data.

Free consumer accounts may use your conversations to improve their models. Use a business or enterprise plan whose terms say your inputs are not used for training, check where data is stored, and follow your firm's and your regulator's rules on confidential information.

3 Always review. Verify every citation in an official database.

AI drafts; you sign. Read every output as if a trainee wrote it. AI tools can invent cases, statutes, rates and deadlines that look completely real. Open every citation, rate and date in an official or subscription database before it reaches a client, a court or a tax authority.

How to use this guide

- Copy the grey box into your AI tool. Replace every `[PLACEHOLDER]` with your own (anonymised) details.
- Read the **Check:** line under each prompt. It tells you what a professional must verify before anything leaves the firm.
- Rules differ by country. Where a prompt says “your jurisdiction”, the answer must come from your local law and official sources.
- Prefer copy-paste from a text file? Use the plain-text version, **101-AI-Prompts.txt**, that comes with this PDF.

This guide is general information, not legal, tax or accounting advice. You remain responsible for all work product and for complying with your professional and data protection rules.

CONTENTS

101 prompts, 10 sections

01 **Client communication** — 4
Prompts 1–10

02 **Document requests & onboarding** — 6
Prompts 11–20

03 **Legal research (with verification)** — 8
Prompts 21–30

04 **Drafting & contracts** — 10
Prompts 31–41

05 **Litigation & pre-action** — 12
Prompts 42–51

06 **Tax & VAT** — 14
Prompts 52–61

07 **Bookkeeping & payroll checks** — 16
Prompts 62–71

08 **Meetings & minutes** — 18
Prompts 72–81

09 **Firm admin & billing** — 20
Prompts 82–91

10 **Marketing & business development** — 22
Prompts 92–101

SECTION 01 · 10 PROMPTS

Client communication

Clear, warm, accurate messages to clients, written in minutes instead of half an hour.

001 Explain a complex matter in plain language

```
You are a senior [lawyer/accountant] writing to a client with no professional background. Rewrite the following explanation in plain language, under 250 words, with short paragraphs. Keep every legal or financial consequence; remove jargon or define it in one line. End with the 2-3 decisions the client needs to make.

Text:
[PASTE EXPLANATION]
```

Check: Every consequence and deadline from the original is still there and nothing was softened.

002 Reply to an anxious client

```
Draft a reply to this client email. The client is worried about [ISSUE]. Tone: calm, empathetic, professional, no false reassurance. Structure: acknowledge the concern, state what we know, state what we do not know yet, give the next step and when they will hear from us. Do not promise outcomes.

Client email:
[PASTE EMAIL]

Facts I can confirm:
[BULLET FACTS]
```

Check: No promises of outcome or timing that the firm cannot keep.

003 Deliver bad news

```
Help me tell a client that [BAD NEWS, e.g. the deadline was missed by the other side / the deduction is not allowed / the claim is weak]. Write a short email that: states the news in the first two sentences, explains why in plain terms, sets out the realistic options with pros and cons, and recommends one. Tone: direct and respectful.

Context:
[CONTEXT]
```

Check: The legal or tax reasoning is correct for your jurisdiction and the options are genuinely available.

004 Turn a long email thread into a status update

```
Summarise this email thread for the client in a status update with these headings: Where we are, What happened since last update, What we need from you (with dates), Next steps (who / what / when). Max 200 words. Do not add facts that are not in the thread.

Thread:
[PASTE THREAD, NAMES REMOVED]
```

Check: Dates and responsibilities match the thread exactly.

005 Chase a client politely for a reply

```
Write three versions of a follow-up email to a client who has not replied for [NUMBER] days about [TOPIC]: (1) friendly nudge, (2) firmer reminder explaining the consequence of delay ([CONSEQUENCE]), (3) final notice stating what we will do if we do not hear back by [DATE]. Each under 120 words.
```

Check: The consequence and final-notice wording is consistent with your engagement terms.

006 Answer a fee question

```
A client asks: "[CLIENT QUESTION ABOUT FEES]". Our engagement terms say: [PASTE RELEVANT CLAUSE]. Draft a clear, non-defensive reply that explains how the fee was calculated, what it covers and what it does not, and offers a short call if they want to discuss.
```

Check: Figures match the invoice and engagement letter; nothing new is conceded by accident.

007 Translate and adapt a client letter

```
Translate this letter from [LANGUAGE A] to [LANGUAGE B] for a client. Keep the legal or financial meaning exact. Where a term has no direct equivalent, keep the original term in brackets after the translation. Flag in a list at the end any sentence where the meaning could be ambiguous.

Letter:
[PASTE LETTER]
```

Check: A fluent professional reviews any term of art and every flagged sentence.

008 Prepare a client FAQ for a recurring topic

```
Write a client-facing FAQ on [TOPIC, e.g. what happens after a company is incorporated / how the annual accounts process works]. 8-10 questions clients actually ask, answers of 2-4 sentences, plain language, jurisdiction-neutral where possible and marked [CHECK FOR YOUR JURISDICTION] where rules vary.
```

Check: Every [CHECK FOR YOUR JURISDICTION] item is resolved before sending.

009 Set expectations at the start of a matter

```
Draft a 'what to expect' email for a new client on a [MATTER TYPE]. Include: the main stages, typical timeframes stated as ranges with the caveat that they vary, what we need from them at each stage, how and when we will communicate, and who their contact is. Max 300 words.
```

Check: Timeframes reflect your firm's real experience, not generic estimates.

010 Rewrite my draft to sound more human

```
Edit my draft email to a client. Keep all content and facts. Make it warmer and more concise, remove stiff phrases (e.g. 'please find attached', 'we refer to the above'), and use active voice. Show the edited version, then a list of what you changed.

Draft:
[PASTE DRAFT]
```

Check: No fact, figure or caveat was dropped in the edit.

SECTION 02 · 10 PROMPTS

Document requests & onboarding

Get the right documents, the first time, with less back-and-forth.

011 Build a document checklist for a matter

```
Create a document request checklist for a [MATTER TYPE, e.g. year-end accounts for a small company / residential property purchase / employment dispute] in [YOUR JURISDICTION]. Group items by category, mark each as Essential or Helpful, and add a one-line plain-language explanation of why we need it.
```

Check: Remove anything not needed and add any local requirement the AI missed.

012 Write the document request email

```
Turn this checklist into a friendly email to the client. Lead with the 5 most important items and a deadline of [DATE]. Put the rest in a numbered list. Explain how to send files securely via [SECURE PORTAL/METHOD] and ask them not to send documents by ordinary email.

Checklist:
[PASTE CHECKLIST]
```

Check: The secure method named is the one your firm actually uses.

013 Spot what is missing from what the client sent

```
Compare the documents the client has provided against the required list. Output a table: Required item | Received (Yes/No/Partial) | Notes. Then draft a short email asking only for what is missing or incomplete.

Required:
[LIST]

Received (file names and a one-line description of each):
[LIST]
```

Check: Open the actual files; the AI only sees the names and descriptions you gave it.

014 Draft an engagement letter outline

```
Outline an engagement letter for a [SERVICE] engagement. Headings and bullet points only: scope, what is excluded, client responsibilities, fees and billing, timing, communication, data protection, limitation of liability, termination, complaints. Mark items that are regulated in many jurisdictions with [REGULATED - CHECK].
```

Check: Use your firm's approved template and regulator rules; this is only a checklist of topics.

015 Explain the client identification process

```
Write a short, friendly explanation for new clients of why we must verify their identity and source of funds before starting work (anti-money-laundering rules). List what they will need to provide: [LIST FROM YOUR PROCEDURE]. Make it clear this is a legal obligation for us, not suspicion of them.
```

Check: The list of documents matches your firm's written AML procedure.

016 Create an intake questionnaire

```
Design a client intake questionnaire for [MATTER TYPE]. 12-15 questions, grouped into sections, mostly closed questions (yes/no, choices, dates) with a few open ones. Include a conflict-check section (other parties involved) and a question on deadlines the client is aware of.
```

Check: Conflict questions capture every party your conflict system needs.

017 Summarise a new client's documents into a file note

```
Read these documents (names and identifiers removed) and write an internal file note: background, key dates, parties (by role), amounts, open questions, and documents that seem to be missing. Quote the source document for each key fact.

[PASTE DOCUMENTS]
```

Check: Spot-check each key fact against the quoted source.

018 Welcome pack for a new client

```
Write a one-page welcome note for a new client of a [LAW/ACCOUNTING] firm: who their team is ([ROLES]), how to contact us, our response-time standard ([STANDARD]), how billing works, how to send documents securely, and what happens in the first 30 days.
```

Check: Response times and contacts are ones the team will actually honour.

019 Onboarding timeline for the client

```
Create a simple week-by-week onboarding timeline for a new [SERVICE] client covering the first [NUMBER] weeks: what we do, what the client does, and the milestone at the end of each week. Present it as a table.
```

Check: The sequence fits your real workflow and staffing.

020 Standardise messy client data

```
Clean this client-provided list into a table with consistent columns: [COLUMNS, e.g. date, description, amount, currency, category]. Standardise date format to [FORMAT]. Do not guess missing values; mark them MISSING. List any rows you could not interpret.

[PASTE DATA, NO PERSONAL IDENTIFIERS]
```

Check: Totals of the cleaned table match the totals of the original.

SECTION 03 · 10 PROMPTS

Legal research (with verification)

Use AI to map the ground and frame questions. Never to supply a citation you have not checked.

021 Map the issues before researching

```
I am researching the following question in [YOUR JURISDICTION]: [QUESTION]. Facts: [ANONYMISED FACTS]. Do not give me case citations. Instead, list: the legal issues raised, the type of authority likely to govern each (statute, regulation, case law, guidance), the key terms to search in an official database, and the questions I must answer from the facts.
```

Check: Search each issue yourself in an official or subscription database.

022 Turn a question into search strings

```
Create search strings for researching [ISSUE] in [DATABASE NAME]. Give 5 Boolean searches with synonyms, truncation and proximity operators, from broad to narrow, and explain in one line what each one is designed to catch.
```

Check: Adjust operator syntax to the database you actually use.

023 Summarise a judgment you already have

```
Summarise this judgment for a busy partner: court and date, facts in 5 lines, the issue(s), the holding, the reasoning in bullet points, any dissent, and how it could help or hurt a client in the position of [CLIENT ROLE]. Quote paragraph numbers for every point.

[PASTE FULL JUDGMENT TEXT]
```

Check: Check every paragraph reference and confirm the judgment has not been overturned or distinguished.

024 Compare two authorities

```
Compare these two decisions/provisions on [ISSUE]. Table: point of comparison | Authority A | Authority B | practical consequence. Then say where they conflict and which factors might decide which one applies. Use only the texts I paste.

A:
[PASTE]

B:
[PASTE]
```

Check: Confirm the hierarchy and current status of both authorities yourself.

025 Explain a statute section line by line

```
Explain this statutory provision line by line in plain English: what each subsection requires, who it applies to, exceptions, and defined terms (tell me where they are defined if stated). Then list 3 interpretation questions a court might have to decide.

[PASTE PROVISION AND DEFINITIONS]
```

Check: Check you have the current consolidated version of the provision.

026 Stress-test my argument

```
Act as opposing counsel. Here is my argument on [ISSUE]. Identify the 5 strongest counterarguments, the factual weaknesses, and the questions a judge would ask. Rank them by how damaging they are. Do not cite authorities.

Argument:
[PASTE]
```

Check: Research the counterarguments with real authorities before relying on them.

027 Draft a research memo structure

```
Create the structure of a legal research memo on [QUESTION]: Question presented, Short answer (leave as [TO COMPLETE]), Facts, Applicable law (headings only), Analysis (one heading per issue), Risks, Recommendation. Under each heading write what must be researched to fill it.
```

Check: The memo is filled with verified authorities, not AI-generated ones.

028 Verify citations in a draft

```
Extract every citation (cases, statutes, articles) from this draft into a table: citation as written | proposition it supports | paragraph of the draft. Do not confirm whether they exist; I will check each one in an official database.

[PASTE DRAFT]
```

Check: Open every citation in an official database and confirm it says what the draft claims.

029 Plain-language note on a new rule

```
Explain this new rule/guidance to [AUDIENCE, e.g. our clients who run small businesses]: what changes, from when, who is affected, what they should do now. 300 words max. Use only the text provided.

[PASTE OFFICIAL TEXT]
```

Check: Dates and scope match the official publication.

030 Find the gaps in a research file

```
Here are my research notes on [ISSUE]. List: questions I have not answered, authorities I mention but have not read in full, assumptions I am making, and any point where my notes contradict each other.

[PASTE NOTES]
```

Check: Treat the output as a to-do list and close each item yourself.

SECTION 04 · 11 PROMPTS

Drafting & contracts

First drafts, reviews and redlines faster, with the lawyer firmly in charge.

031 First draft of a clause

```
Draft a [CLAUSE TYPE, e.g. confidentiality / limitation of liability / termination] clause for a [CONTRACT TYPE] between [PARTY ROLES]. We act for [PARTY]. Commercial points: [POINTS]. Give a balanced version and a version favourable to our client, with a one-line note on the difference.
```

Check: Adapt to governing law and check enforceability in your jurisdiction.

032 Review a contract for our client

```
Review this contract from the perspective of [CLIENT ROLE]. Output a table: clause number | issue | risk level (High/Medium/Low) | suggested change. Focus on liability, payment, termination, IP, confidentiality, dispute resolution and anything unusual. Then list anything that appears to be missing.

[PASTE CONTRACT, NAMES REMOVED]
```

Check: A qualified lawyer reviews every High and Medium item against the full contract.

033 Explain a contract to the client

```
Write a 1-page summary of this contract for our client: what they must do, what the other side must do, key dates and deadlines, payment terms, how either party can exit, and the 3 biggest risks for them. Plain language, clause references in brackets.

[PASTE CONTRACT]
```

Check: Each clause reference points to the right clause.

034 Compare two versions

```
Compare version 1 and version 2 of this agreement. List every substantive change (ignore formatting),
the clause affected, and whether it is better or worse for [CLIENT ROLE]. Flag deleted protections in
particular.

V1:
[PASTE]

V2:
[PASTE]
```

Check: Run your document-comparison tool as well; AI can miss changes in long texts.

035 Negotiation response to a markup

```
The other side has marked up our draft. For each change below, suggest: accept / reject / counter,
with a short reason and a proposed counter-wording. Our priorities are [PRIORITIES]; we can concede
on [POINTS].

Changes:
[PASTE CHANGES]
```

Check: Final positions are agreed with the client before sending.

036 Draft a simple letter of demand for payment

```
Draft a letter requesting payment of an overdue invoice of [AMOUNT] due on [DATE] for
[SERVICE/GOODS]. Firm but professional. Include: amount, invoice reference, a deadline of [NUMBER]
days, and what will happen if unpaid ([NEXT STEP]). Leave [STATUTORY INTEREST / LOCAL REQUIREMENTS]
as placeholders.
```

Check: Local pre-action requirements and interest rules are complied with.

037 Defined terms consistency check

```
Check this draft for: defined terms used before they are defined, terms defined but never used,
inconsistent capitalisation, and the same concept described with different words. Output a list with
clause references.

[PASTE DRAFT]
```

Check: Fix in the master document and re-run your own proofreading.

038 Plain-English rewrite of a clause

```
Rewrite this clause in plain English without changing its legal effect. Then list any place where
simplifying could change the meaning and keep the original wording there.

[PASTE CLAUSE]
```

Check: Confirm the legal effect is identical before replacing the original.

039 Build a precedent from past drafts

```
Here are three versions of a [DOCUMENT TYPE] we have used (anonymised). Create a single precedent
with the best wording from each, square-bracketed options where they differ, and drafting notes
explaining when to use each option.

[PASTE VERSIONS]
```

Check: A partner approves the precedent before it enters your library.

040 Draft a board resolution or minutes of decision

```
Draft a written resolution of the [BOARD/SHAREHOLDERS] of a company approving [DECISION]. Include
recitals, the resolutions, and signature blocks. Mark with [CHECK] any formalities (notice, quorum,
majority) that depend on the articles or local company law.
```

Check: Formalities match the company's constitution and local law.

041 Due diligence question list

```
Create a due diligence request list for [TRANSACTION TYPE] of a [TARGET DESCRIPTION]. Sections:
corporate, contracts, employees, property, IP, data protection, tax, litigation, regulatory.
Prioritise items as Red flag / Important / Nice to have.
```

Check: Tailor to the target's sector and what the client actually needs to know.

SECTION 05 · 10 PROMPTS

Litigation & pre-action

Chronologies, case analysis and correspondence, done in a fraction of the time.

042 Build a chronology from documents

```
Create a chronology from the documents below. Table: date | event | source document and page |
significance. Sort by date. Where a date is unclear, mark it [UNCLEAR] and explain. Do not infer
events not in the documents.

[PASTE DOCUMENTS OR EXTRACTS]
```

Check: Check each entry against its source; dates are where errors hide.

043 Early case assessment

```
Based on these anonymised facts, structure an early case assessment for [CLIENT ROLE]: possible
claims or defences, elements to prove for each, evidence we have, evidence we need, main risks, and
questions for the client. No predictions of outcome and no citations.

Facts:
[PASTE]
```

Check: Legal analysis and merits are assessed by the responsible lawyer.

044 Questions for a client interview

```
Prepare an interview plan for a meeting with a client in a [DISPUTE TYPE]. 20 questions in logical order, from open to specific, covering the timeline, documents, witnesses, losses and what outcome the client wants. Flag sensitive questions.
```

Check: Add questions specific to the client's facts.

045 Witness statement outline

```
From these interview notes, create an outline for a witness statement in chronological order with headings, the facts the witness can speak to first-hand, and gaps to clarify. Keep the witness's own words where quoted. Do not add facts.

[PASTE NOTES]
```

Check: The final statement is in the witness's own words and complies with your court rules.

046 Summarise the other side's letter

```
Summarise this letter from the other side: what they claim, what they demand, deadlines, any admissions, any threats, and the tone. Then list the points we must respond to.

[PASTE LETTER]
```

Check: Deadlines are entered in your diary system immediately.

047 Draft a response to a letter before action

```
Draft a response on behalf of [CLIENT ROLE] to the attached letter. Our position: [POSITION]. Admit nothing beyond [ADMITTED FACTS]. Request the documents listed: [LIST]. Professional and firm. Mark with [CHECK] any procedural requirement in [YOUR JURISDICTION].

Letter:
[PASTE]
```

Check: Nothing in the letter makes an admission the client has not approved.

048 Settlement options analysis

```
Lay out settlement options for this dispute: structure (payment, terms, timing), what each side gains, risks, and non-monetary terms to consider (confidentiality, non-disparagement, costs). Use the parameters: claim value [AMOUNT], estimated costs to trial [AMOUNT], client priorities [PRIORITIES].
```

Check: Figures and any outcome estimates come from the lawyer, not the AI.

049 Disclosure / document review coding

```
Review these documents and tag each as: Relevant / Not relevant / Possibly privileged, with a one-line reason, against these issues: [ISSUES]. Output a table.

[PASTE DOCUMENTS]
```

Check: A lawyer makes every privilege call; AI tags are a first pass only.

050 Hearing preparation checklist

```
Create a preparation checklist for a [HEARING TYPE] in [NUMBER] weeks: documents, bundles, witnesses, skeleton/written submissions, logistics, client preparation. Include a backwards timeline with deadlines.
```

Check: Court-specific deadlines come from the applicable procedural rules.

051 Cross-examination themes

```
From this witness statement, identify inconsistencies, unsupported assertions, and points that contradict the documents I list. Suggest 5 themes for cross-examination with short leading questions for each.

Statement:
[PASTE]

Documents:
[KEY EXTRACTS]
```

Check: Every inconsistency is confirmed in the original documents.

SECTION 06 · 10 PROMPTS

Tax & VAT

Structure the thinking, explain it to clients and catch errors. Rates and rules are always checked at source.

052 Explain a tax rule to a client

```
Explain to a small-business client, in under 200 words, how [TAX TOPIC, e.g. VAT registration thresholds / deductibility of home-office costs] generally works, what they need to keep as records, and what to ask us. Do not state specific rates or thresholds; write [RATE] or [THRESHOLD] for me to fill in.
```

Check: Insert current rates and thresholds from the official tax authority source.

053 Pre-filing checklist

```
Create a pre-filing checklist for a [RETURN TYPE, e.g. annual corporate tax return / VAT return / personal return] in [YOUR JURISDICTION]: data needed, reconciliations to perform, common errors, and sign-off steps. Mark anything jurisdiction-specific with [VERIFY].
```

Check: Every [VERIFY] item is checked against official guidance.

054 Classify expenses for review

```
Classify these transactions into the categories: [CATEGORIES]. For each, add 'Likely deductible / Likely not deductible / Needs review' and a one-line reason. Do not apply rates.

[PASTE TRANSACTIONS, NO PERSONAL DATA]
```

Check: A qualified preparer decides every 'Needs review' item and spot-checks the rest.

055 VAT treatment questions for a new transaction

```
A client plans to [DESCRIBE TRANSACTION, e.g. sell digital services to customers in other countries]. List the questions we must answer to determine the VAT/sales-tax treatment (place of supply, customer status, registration, invoicing, reporting) and the documents we need from the client.
```

Check: The final treatment is determined from current law and authority guidance.

056 Draft a reply to a tax authority letter

```
Summarise this letter from the tax authority: what they are asking, the deadline, and the possible consequences. Then draft a polite, factual reply that provides: [INFORMATION WE WILL PROVIDE] and requests [EXTENSION / CLARIFICATION, if any].

[PASTE LETTER, IDENTIFIERS REMOVED]
```

Check: The deadline is diarised and the reply is reviewed by the responsible adviser.

057 Year-end tax planning conversation

```
Prepare an agenda for a year-end tax planning meeting with a [CLIENT TYPE]. List topics to review (timing of income and expenses, investments, pensions/retirement contributions, equipment purchases, remuneration structure), the data to request in advance, and questions to ask. No specific advice.
```

Check: Topics are adapted to rules and allowances that exist in your jurisdiction.

058 Reconcile tax figures

```
Compare these two sets of figures (ledger vs return draft). List every difference, its amount, and a possible explanation to investigate. Do not adjust anything.

Ledger:
[PASTE]

Return draft:
[PASTE]
```

Check: Investigate each difference in the source records.

059 Tax deadline calendar

```
Create a 12-month compliance calendar template for a [CLIENT TYPE] in [YOUR JURISDICTION]: filings, payments, and reminders 30 and 7 days before. Use [DATE] placeholders where you are not certain of the exact date.
```

Check: All dates are taken from the tax authority's official calendar.

060 Explain a tax computation

```
Explain this tax computation to the client line by line: what each figure is, where it comes from,
and why it is added or deducted. Plain language, max 300 words.

[PASTE COMPUTATION]
```

Check: The explanation matches the computation exactly.

061 Cross-border situation fact-finding

```
A client [DESCRIBE, e.g. is moving abroad / works remotely for a foreign employer / owns property in
two countries]. List the facts we need to establish (residence, days present, income sources,
treaties to check) and the questions to ask them. Do not conclude on residence or liability.
```

Check: Residence and treaty positions are analysed by a specialist using the actual treaty text.

SECTION 07 · 10 PROMPTS

Bookkeeping & payroll checks

Use AI as a second pair of eyes on numbers you already have.

062 Spot anomalies in a ledger

```
Review this ledger extract and flag: duplicate entries, round-number transactions, entries on
weekends or holidays, unusual amounts compared with the rest, and vague descriptions. Output a table
with the row, the flag, and why.

[PASTE LEDGER, NO PERSONAL DATA]
```

Check: Flags are leads, not conclusions; investigate each in the books.

063 Bank reconciliation helper

```
Match these bank transactions to these ledger entries by amount and date (within [NUMBER] days).
Output: matched pairs, unmatched bank items, unmatched ledger items. Do not force matches.

Bank:
[PASTE]

Ledger:
[PASTE]
```

Check: Unmatched items are resolved in the accounting system, not in the chat.

064 Payroll variance check

```
Compare this month's payroll summary to last month's. Flag any employee (by ID only) whose gross, deductions or net changed by more than [PERCENT]%, new starters, leavers, and any change in total cost. Ask for an explanation for each flag.

This month:
[PASTE]

Last month:
[PASTE]
```

Check: Use employee IDs, never names; payroll figures are confirmed in the payroll system.

065 Chart of accounts mapping

```
Map these account names from the client's old system to our standard chart of accounts below. Output: old account | suggested new account | confidence (High/Medium/Low). List any you cannot map.

Old:
[LIST]

Standard:
[LIST]
```

Check: Review every Medium and Low mapping before importing.

066 Month-end close checklist

```
Create a month-end close checklist for a [BUSINESS TYPE] client: bank and card reconciliations, receivables and payables review, accruals and prepayments, payroll journals, VAT/sales tax, fixed assets, management report. Add owner and due day for each task as placeholders.
```

Check: Adapt the steps to the client's systems and your firm's procedures.

067 Explain management accounts to an owner

```
Turn these management accounts into a one-page commentary for a business owner: how the month went, the 3 biggest movements and their likely causes (marked as 'to confirm'), cash position, and 3 questions they should think about.

[PASTE FIGURES]
```

Check: Causes of movements are confirmed with the client before sending.

068 Receivables chase list

```
From this aged debtors list, prepare a prioritised chase list: customer (by reference), amount, days overdue, suggested action (reminder / call / final notice / escalate) and a short message for each action.

[PASTE LIST]
```

Check: Check for disputes or payment plans before chasing.

069 Expense policy compliance check

```
Check these expense claims against this policy. For each claim: compliant / non-compliant / unclear,
and the rule it relates to.

Policy:
[PASTE]

Claims:
[PASTE, IDs ONLY]
```

Check: Receipts are checked by a person; the AI only sees what you pasted.

070 Draft queries to the client

```
From these open items in the books, write a short, friendly list of queries for the client, grouped
by topic, each answerable in one line. Example items: [PASTE OPEN ITEMS].
```

Check: No query reveals another client's information.

071 Cash-flow forecast structure

```
Build a 13-week cash-flow forecast template for a [BUSINESS TYPE]: opening balance, receipts by type,
payments by type (payroll, rent, suppliers, tax, loans), closing balance, and minimum cash alert.
Explain the assumptions to collect from the client.
```

Check: Every assumption comes from the client's real data.

SECTION 08 · 10 PROMPTS

Meetings & minutes

Walk out of every meeting with clean notes, clear actions and a follow-up email ready.

072 Meeting agenda from an email thread

```
From this email thread, draft an agenda for a [DURATION]-minute meeting: objective, 4-6 items with
time allocations, decisions needed, and pre-reading.

[PASTE THREAD]
```

Check: The objective is the one the client actually wants.

073 Clean up rough notes into minutes

```
Turn these rough meeting notes into formal minutes: attendees (by role), items discussed, decisions
taken, actions (owner / deadline). Do not add anything that is not in the notes; mark unclear points
[UNCLEAR].

[PASTE NOTES]
```

Check: Attendees confirm the minutes before they are filed.

074 Follow-up email after a client meeting

```
Write the follow-up email after today's meeting with a client: thank them, summarise what we agreed,
list actions for them and for us with dates, and confirm the next meeting. Under 200 words.

Notes:
[PASTE NOTES]
```

Check: Nothing in the email is advice that was not actually given in the meeting.

075 Extract actions from a transcript

```
From this meeting transcript, extract every action item: what, who, by when. If no owner or date was
set, say so. Then list any decision that was discussed but not clearly made.

[PASTE TRANSCRIPT]
```

Check: Get consent before recording meetings, as your local rules require.

076 Prepare me for a meeting

```
I have a meeting with [CLIENT TYPE] about [TOPIC] in one hour. Based on these notes, give me: 3
points to make, 5 questions to ask, likely objections and how to answer them, and the outcome I
should aim for.

[PASTE NOTES]
```

Check: Substantive answers to objections come from your own expertise.

077 Board pack summary

```
Summarise this board pack for a director in one page: key decisions requested, financial headline,
main risks raised, and questions a careful director should ask.

[PASTE PACK OR EXTRACTS]
```

Check: Directors read the source papers for any decision they vote on.

078 Internal team meeting notes

```
Turn these notes from our weekly team meeting into: matters update (one line each), blockers, who
needs help, deadlines this week. Format for a team chat message.

[PASTE NOTES]
```

Check: Confidential matter details stay inside approved firm tools.

079 Attendance note for the file

```
Write an attendance note for the file from these notes: date, duration, attendees (by role), purpose,
advice given, client instructions, next steps, and time to record. Neutral tone, past tense.

[PASTE NOTES]
```

Check: The advice recorded is exactly what was said.

080 Workshop or training plan

```
Plan a [DURATION] internal session to train our team on [TOPIC]. Include objectives, agenda with timings, a practical exercise using fictional data, and 5 quiz questions to check understanding.
```

Check: Exercises use fictional data only.

081 Meeting with a difficult counterparty

```
Help me prepare for a meeting with [COUNTERPARTY ROLE] who is likely to be [BEHAVIOUR, e.g. aggressive / evasive]. Give me an opening statement, ground rules to propose, phrases to de-escalate, and a plan for if the meeting breaks down.
```

Check: Positions stated are within the client's instructions.

SECTION 09 · 10 PROMPTS

Firm admin & billing

Give back the hours that disappear into admin.

082 Turn time entries into clear narratives

```
Rewrite these time entries into clear billing narratives the client will understand: action + subject + purpose, no internal jargon, no vague entries like 'work on file'. Keep the time recorded.

[PASTE ENTRIES]
```

Check: Narratives describe work that was actually done.

083 Draft a fee estimate

```
Draft a fee estimate for [MATTER TYPE]: stages, assumptions, estimated hours per stage by role, rates [RATES], total range, and what is not included. Present as a table plus a short covering paragraph.
```

Check: Hours and assumptions reflect comparable past matters in your firm.

084 Write-off and realisation review

```
Analyse this work-in-progress report. Identify matters with low realisation, old unbilled time, and budget overruns. Suggest one action for each (bill now / speak to client / review scope).

[PASTE REPORT]
```

Check: Partners decide write-offs; the AI only highlights.

085 Internal procedure document

```
Write a step-by-step internal procedure for [PROCESS, e.g. opening a new matter / sending engagement letters / archiving files]. Numbered steps, who does each, systems used ([SYSTEMS]), and a checklist at the end.
```

Check: The procedure matches how the team actually works.

086 AI acceptable-use policy draft

```
Draft a one-page AI acceptable-use policy for a [SIZE] [LAW/ACCOUNTING] firm: approved tools, what data may never be entered, human review requirements, citation verification, record keeping, who to ask. Mark points that depend on your regulator with [CHECK REGULATOR].
```

Check: Align with your regulator's guidance and data protection obligations.

087 Recruitment: job description

```
Write a job description for a [ROLE] at a [SIZE] [LAW/ACCOUNTING] firm: purpose of the role, responsibilities, must-have and nice-to-have skills, what we offer, and how to apply. Inclusive language; no requirements that are not genuinely needed.
```

Check: Comply with local employment and anti-discrimination law.

088 Interview questions for a hire

```
Create 10 structured interview questions for a [ROLE] candidate, mixing technical, situational and values questions, each with what a strong answer looks like.
```

Check: Ask every candidate the same core questions.

089 Complaint response

```
Draft a response to this client complaint. Acknowledge, summarise the complaint fairly, explain what we have investigated, respond point by point, set out what we will do, and include our complaints procedure ([PASTE PROCEDURE]). No admissions of liability without [PARTNER] approval.

Complaint:
[PASTE]
```

Check: Check any regulatory complaint-handling requirements and insurer notification duties.

090 Supplier or software comparison

```
Compare these [SOFTWARE TYPE] options for a [SIZE] firm: [OPTIONS]. Criteria: features we need ([LIST]), data location and security, integrations, pricing model, support. Output a table and list the questions to ask each vendor.
```

Check: Confirm prices, data-processing terms and security claims directly with each vendor.

091 Weekly priorities for a partner

```
Here is my task list and calendar for the week. Sort tasks into: must do (deadline or client impact), delegate (to whom), schedule, drop. Then suggest a realistic daily plan.

[PASTE LIST]
```

Check: You decide what gets delegated or dropped.

SECTION 10 · 10 PROMPTS

Marketing & business development

Show expertise in public and win the right clients, without breaching professional rules.

092 LinkedIn post from a recent matter (anonymised)

```
Write a LinkedIn post of 150-200 words sharing a practical lesson from a recent [MATTER TYPE], fully anonymised. Hook in the first line, one concrete insight, one takeaway for business owners, no client details, no promises of results.

Lesson:
[DESCRIBE]
```

Check: Nothing identifies the client and the post meets your professional advertising rules.

093 Article from a new rule

```
Turn this summary of a new rule into a 600-word article for business owners: what changed, who is affected, 3 practical steps, and when to get advice. Headline and subheadings included.

[PASTE SUMMARY]
```

Check: Facts and dates are checked against the official source before publishing.

094 Client newsletter

```
Draft a monthly client newsletter for a [LAW/ACCOUNTING] firm: 3 short items on [TOPICS], one practical tip, one upcoming deadline reminder, and a firm update. Friendly tone, under 500 words.
```

Check: Every deadline and rule mentioned is verified.

095 Website service page

```
Write a service page for our [SERVICE] for [TARGET CLIENT]: the problem they face, how we help, the process in steps, what it costs to get started (placeholder [PRICE]), FAQs, and a call to action. No superlatives we cannot prove.
```

Check: Claims comply with your professional advertising rules.

096 Referral partner outreach

```
Write a short, personal email to a [REFERRAL PARTNER TYPE, e.g. accountant / lawyer / banker]
proposing a referral relationship: who our ideal clients are, how we can help their clients, and a
suggestion for a 20-minute call.
```

Check: Respect any rules on referral fees in your profession.

097 Proposal for a prospective client

```
Draft a proposal for [PROSPECT TYPE] who needs [NEED]: understanding of their situation, our
approach, team, timeline, fees ([FEES]), and why us. Max 2 pages. Use the information from our call:

[PASTE NOTES]
```

Check: Fees and scope are approved before sending.

098 Ideal client profile

```
Help me define our ideal client profile: industry, size, typical problems, triggers that make them
look for help, where they get information, and objections to hiring a firm like ours. Base it on
these descriptions of our 5 best clients (anonymised):

[PASTE]
```

Check: Validate the profile by talking to real clients.

099 Turn a webinar into content

```
From this webinar transcript, create: 5 LinkedIn posts, 1 newsletter item, 10 short quotes, and a
one-page checklist for attendees.

[PASTE TRANSCRIPT]
```

Check: Each piece is accurate and reviewed before publishing.

100 Follow-up after a networking event

```
Write a follow-up message to someone I met at [EVENT] who mentioned [THEIR CHALLENGE]. Reference our
conversation, share one useful resource or idea, and suggest a next step without a hard sell. Under
100 words.
```

Check: Personal details used are ones they shared with you.

101 Ask for a review or testimonial

```
Draft a short email asking a satisfied client for a review or testimonial on [PLATFORM]. Make it easy
(2-3 guiding questions), optional, and appreciative.
```

Check: Check whether your professional rules allow testimonials and how they must be presented.

NEXT STEP

Want these wired into your *firm's workflow?*

Copy-paste is the start. The real time savings come when the right prompts sit inside the tools your team already uses, with clear rules on data, review and verification.

- Where AI can save your team time this month
- Which tasks must stay human-only
- A safe, documented way to roll it out

Book an AI diagnostic at corpusproof.com

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