

ChatGPT & Claude Prompts for Accountants & Bookkeepers

A practical starter library of AI prompts for client comms, advisory, chasing, and practice admin

Direct answer: what can an accounting or bookkeeping firm use ChatGPT or Claude for?

You can use them to draft client emails, explain reports and figures in plain English, chase overdue invoices and missing records, turn numbers *you* provide into advisory talking points, and write proposals, engagement letters, and onboarding checklists. They are a drafting and explaining tool, not a source of truth: a qualified person checks any numbers or advice before it leaves the practice, and identifiable client financial data is never pasted into public AI tools.

1. Client communication & explaining reports

These prompts help you translate what you already know into clear client-facing writing. You supply the figures; the AI supplies the plain-English wrapper.

Explain a report in plain English

You are helping me write to a client who is not financially trained. Explain the following figures from their QuickBooks or Xero file in plain English, in a warm, professional tone: [figures]. Cover what each number means for their business and flag anything worth a conversation. Do not give tax or investment advice.

Summarise the month for a client

Draft a short monthly update email to [client name] for the period [period]. Use these figures I am providing: [figures]. Keep it to four or five sentences, highlight one thing that improved and one thing to watch, and end with an offer to talk it through.

Answer a client question clearly

A client asked: "[paste their question]". Draft a clear, plain-English reply based only on the facts I give you here: [figures]. If answering properly needs information I have not provided, list what you would need rather than guessing.

Rewrite jargon for a non-accountant

Rewrite this paragraph so a busy small-business owner understands it on first read, without losing accuracy: "[paste your draft]". Keep it professional, avoid jargon, and keep it under [word count] words.

2. Chasing overdue invoices & missing records

Firm, polite chasing at scale is one of the most repetitive jobs in a practice. These prompts keep the tone right while you fill in the specifics.

First reminder — overdue invoice

Draft a friendly first reminder to [client name] about invoice [invoice number] for [amount], which was due on [due date]. Keep it warm and assume it was an oversight. Make it easy to pay and offer to resend the invoice if needed.

Firmer follow-up

Write a firmer but still professional follow-up to [client name] about invoice [invoice number] for [amount], now [X weeks] overdue and previously reminded once. State the next step clearly, keep the relationship intact, and invite them to reply if there is a problem.

Chase missing records before IRS filing deadlines

Draft an email to [client name] requesting the missing records I need to complete their work for [period]. The outstanding items are: [list]. Explain briefly why each is needed, give a clear due date, and keep the tone helpful rather than nagging.

Set up a reusable reminder sequence

Write three short reminder emails I can reuse for overdue invoices: a gentle nudge at [X days] overdue, a firmer note, and a final notice. Use placeholders like [client name], [invoice number], and [amount] so I can drop in details each time.

3. Advisory & meeting prep

Advisory conversations are where the value is. Use these to turn figures you have already reviewed into a structured discussion — the AI organises, it does not decide.

Talking points from the numbers

I am meeting [client name] to discuss their results for [period]. Based only on these figures: [figures], give me five advisory talking points, each with a plain-English observation and a question I could ask them. Do not invent numbers or trends I have not provided.

Prep an agenda

Draft a one-page agenda for a [period] review meeting with [client name]. Structure it as: performance, cash flow, upcoming obligations, and one improvement idea. I will provide the figures under each heading – leave clear placeholders where my numbers go.

Frame the cash-flow story

Help me explain a cash-flow issue to [client name] without alarming them. Here is the situation and the figures: [figures]. Draft how I would describe what is happening, why it matters, and two practical options to discuss. Keep it factual and non-prescriptive.

Anticipate client questions

Before my meeting with [client name] about [period], list the ten questions a business owner is most likely to ask about these results: [figures]. For each, note what I should have ready to answer well.

4. Proposals, engagement letters & onboarding

First-draft the paperwork, then review and localise it. Every one of these outputs needs a human check before it goes to a client.

Draft a proposal

Draft a proposal for [client name], a [industry] business, for the following services: [list]. Include scope, what is and is not included, and how we work together. Leave pricing as a placeholder [amount]. Professional, warm, and easy to skim.

Outline an engagement letter

Draft a plain-English engagement letter outline for [client name] covering scope, responsibilities of each party, fees [amount], and how either side can end the engagement. This is a first draft for me to review and adapt – flag anything I should have a professional check against GAAP.

Build a new-client onboarding checklist

Create an onboarding checklist for a new [industry] client moving to our practice on QuickBooks or Xero. Include the documents to request, access to set up, and the first three touchpoints in their first month. Format it as a checklist I can reuse.

Draft a welcome email

Write a warm welcome email for a new client, [client name], starting with our practice for [services]. Set expectations for the first month, list what we need from them, and reassure them the transition will be smooth.

5. Practice admin & marketing

The background work that keeps a practice running and visible — drafts you can produce in minutes and refine.

Write a client-facing deadline reminder

Draft a general reminder email to clients about the upcoming [period] deadline for IRS deadlines and tax season. Keep it clear and calm, tell them what we need and by when, and use [client name] as a placeholder for the merge field.

Draft a newsletter section

Write a short, friendly newsletter section for small-business clients about [topic]. Keep it practical, avoid jargon, under [word count] words, and end with an invitation to get in touch with the practice.

Draft an internal process note

Turn these rough notes into a clear internal process document for my team: "[paste notes]". Structure it as purpose, steps, and who is responsible. Keep it concise enough to actually be followed.

Repurpose an FAQ answer

Turn this answer I often give clients into three formats: a short website FAQ entry, a social post, and a paragraph I can paste into an email. Original answer: "[paste answer]". Keep the meaning accurate.

Before you send: two non-negotiables

Do not paste identifiable client financial data — names tied to figures, tax file numbers, bank details — into public AI tools; strip or anonymise first and respect client confidentiality obligations. And a qualified person reviews any numbers or advice the AI helped produce before it goes to a client. The prompt gives you a draft, not a decision.

When prompting isn't enough

Everything above is manual: you open a chat window, paste the context, copy the result back, and do it again for the next client. That is a real gain when it is occasional. But most of these jobs — chasing overdue accounts, explaining the month, prepping the same review, reminding clients before tax season — are the same workflow repeated across your entire client book, week after week.

At that point, copy-paste prompting is the bottleneck. The next step is to have that chase, explain, or prep run automatically inside the systems you already use — your QuickBooks or Xero data, your email, your practice tools — with your sign-off on anything that goes to a client. That is the difference between using AI and having AI built into how the practice runs.

That is what SG1 does: we take the repetitive, whole-of-book workflows and wire them into your existing environment with a human approval step, so the work happens without a person driving each prompt by hand. The prompts in this guide are a genuinely useful place to start — talk to us when you want the workflow itself automated rather than run one client at a time.