
DISCOVER • BUILD • HAND OFF

SMALL BUSINESS CLARITY KIT GUIDE

Sell clarity, not complexity.

Create a usable weekly system.

Protect the advisory boundary.

DISCOVERY | SYSTEM | HANDOFF | TRUST

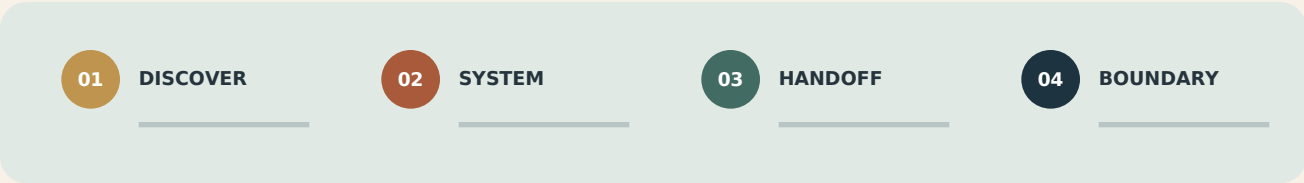
Veteran's Strategic Solutions LLC



START HERE

How to Use This Guide

Read the core guide first. Then use the worksheets to define the offer, select a tier, budget the software and advisory controls, estimate each engagement, document scope and professional boundaries, invoice completed work, track leads and client follow-through, and control privacy, data, tax-support, records, insurance, and representation risks.

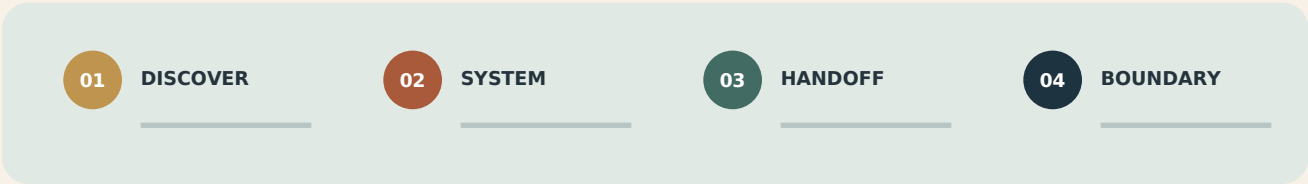


DISCOVERY | Gather sales, costs, fixed expenses, receipts, workflow, and the owner’s actual weekly questions.

PIECE	USE
Core guide	Sell a simple weekly profit system and optional catch-up structure while keeping accounting, tax preparation, filing, and legal work outside the service unless separately qualified and authorized.
Operating kit	Use the startup, budget, estimate, engagement scope, invoice, tracker, and compliance pages for every client.

CORE GUIDE 01

1. Core Offer - Small Business Clarity Kit



Build simple, usable weekly profit systems for owners who are too busy to track numbers. The goal is clarity, not complicated accounting.

Name options in use:

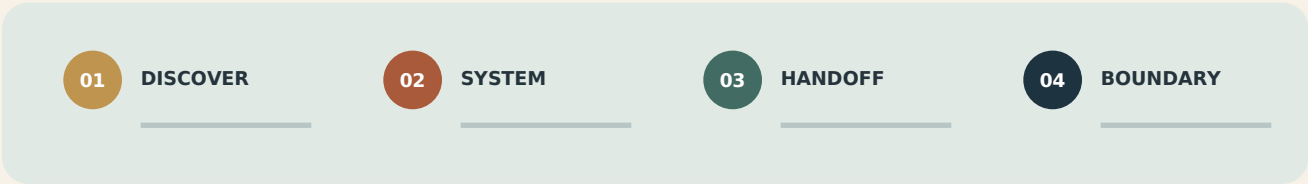
- Owner’s Weekly System
- Operations Starter Package

Three-Tier Offer

BUSINESS LENS	CONTROL
Clarity	The client can see weekly sales, costs, fixed expenses, and profit without a complicated accounting system.
Boundary	The owner performs filing work; the provider structures the sequence and does not silently become the preparer.
Handoff	A locked, usable system and short walkthrough make the deliverable concrete.

CORE GUIDE 01

1. Core Offer – Small Business Clarity Kit Continued



Basic – \$197

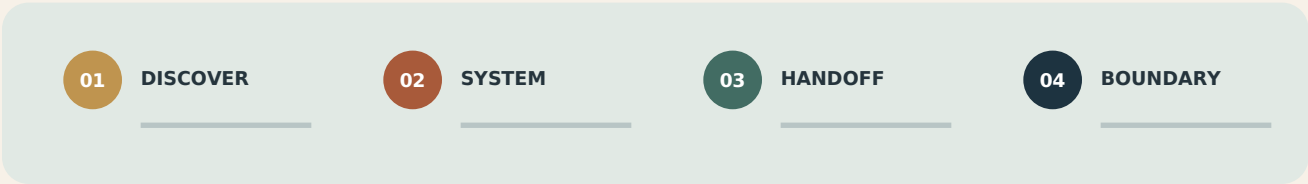
- Custom weekly tracker (sales, costs, profit)
- Simple monthly fixed-cost sheet
- One-page instructions + short walkthrough

Standard – \$397

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CORE GUIDE 01

1. Core Offer – Small Business Clarity Kit Continued



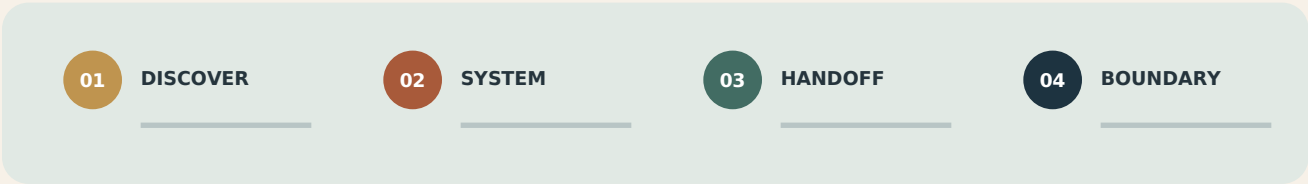
- Everything in Basic
- Inventory / reorder tracker
- Receipt organization system
- 30-day check-in

Complete – \$597

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CORE GUIDE 01

1. Core Offer – Small Business Clarity Kit Continued



- Everything in Standard
- Cash vs card split tracking
- Year-to-date summary page
- Extra customization + follow-up support

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CORE GUIDE 02

2. New High-Value Add-On: Prior-Year Tax Catch-Up Support

01

DISCOVER

02

SYSTEM

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HANDOFF

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BOUNDARY

Many small owners (especially food trucks and mobile vendors) have one or two years of unfilled income tax returns. This is often the real blocker to growth, loans, or moving into a brick-and-mortar location.

The business can offer a calm, step-by-step catch-up package that sits alongside the Clarity Kit.

What the Tax Catch-Up Includes

Two separate guides delivered to the owner:

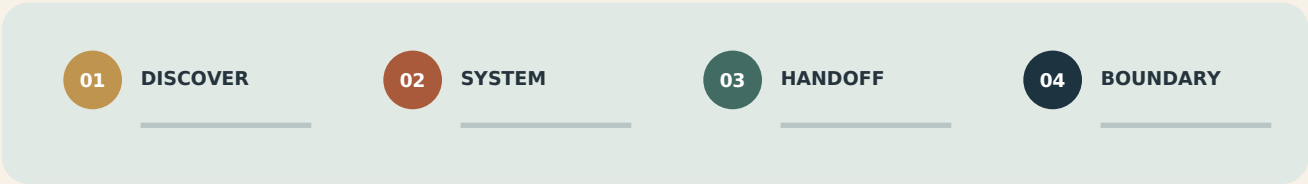
1. Prior-Year Income Tax Filing Guide – broken into a one-week plan so it does not feel overwhelming. Covers QuickBooks reports, free IRS transcripts, free/low-cost tax software options, form-by-form guidance, and Certified Mail filing.



WEEKLY SYSTEM | Build a simple input routine that turns owner-entered activity into usable operating clarity.

CORE GUIDE 02

2. New High-Value Add-On: Prior-Year Tax Catch-Up Support Continued



2. Payment & Relief Guide – what to do after the returns are filed. Covers waiting times, how to see the exact balance, IRS and applicable state installment plans [VERIFY], penalty relief options, and later options such as Offer in Compromise.

The owner does the work using free tools and their existing QuickBooks data. A short CPA review (1-2 hours) is recommended only for accuracy before mailing. The service does not prepare or file the returns.

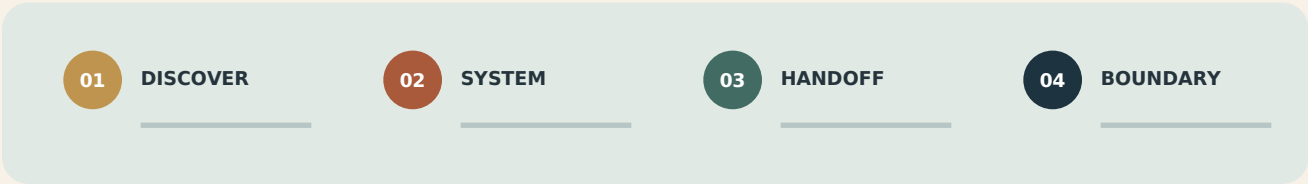
How It Fits the Business Model

- Can be sold as a stand-alone service to owners who only need the tax catch-up
- Can be bundled with any Clarity Kit tier as an optional upgrade

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CORE GUIDE 02

2. New High-Value Add-On: Prior-Year Tax Catch-Up Support Continued



- Positions the business as the practical “get the numbers and the compliance sorted” partner, not a traditional accounting firm
- Creates natural follow-on work (weekly tracking systems once the back taxes are under control)

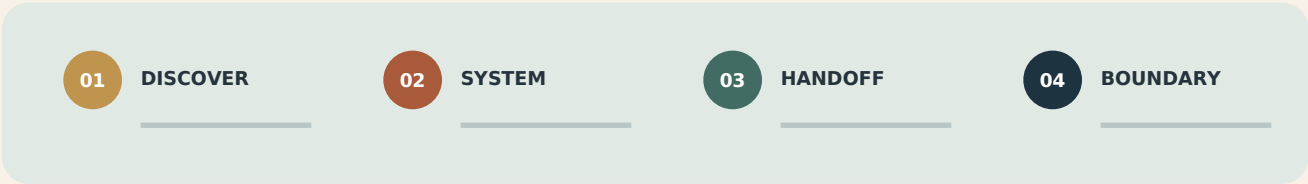
Suggested Pricing for the Tax Catch-Up Add-On

- Stand-alone: \$297 – \$397 (guides + short orientation call)
- Bundled with any Clarity Kit: \$197 – \$247 add-on

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CORE GUIDE 02

2. New High-Value Add-On: Prior-Year Tax Catch-Up Support Continued

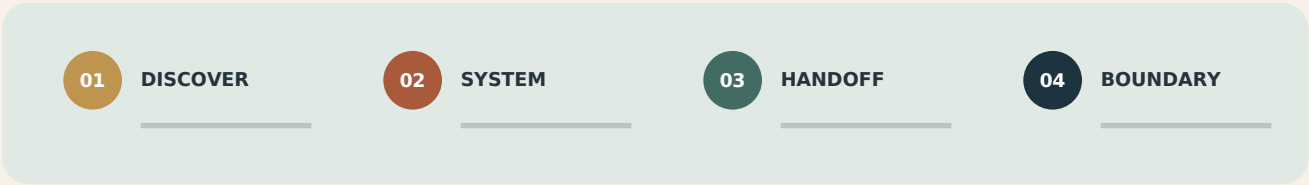


Price stays low because the heavy lifting is done by the owner with free tools. The value is the calm structure, the correct sequence, and the reduction of overwhelm.

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CORE GUIDE 03

3. Who This Serves



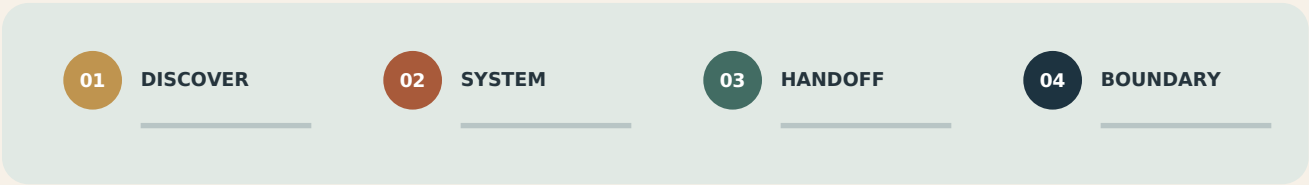
Primary:

- Food trucks and mobile vendors
- Small service businesses (cleaning, lawn, mobile mechanics, etc.)
- Military spouse-owned and veteran-owned micro businesses
- Any owner who is making sales but does not know real weekly profit or has compliance hanging over them

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CORE GUIDE 04

4. Delivery Model



Clarity Kit:

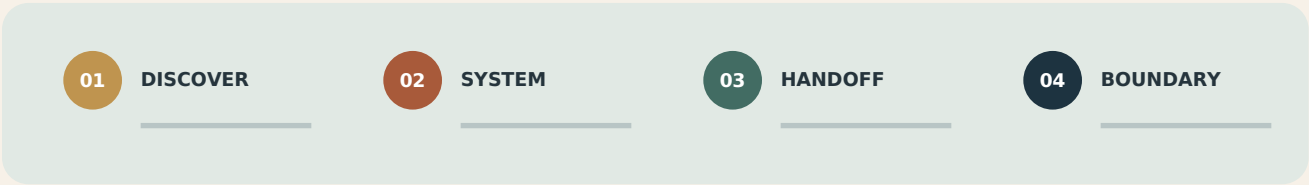
Short discovery → build locked spreadsheets (yellow input cells only) → hand-off with walkthrough → optional 30-day check-in.

Tax Catch-Up:

Deliver the two guides + 20-30 minute orientation call. Owner executes the steps. The provider stays available for clarifying questions but do not prepare the returns.

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5. Positioning

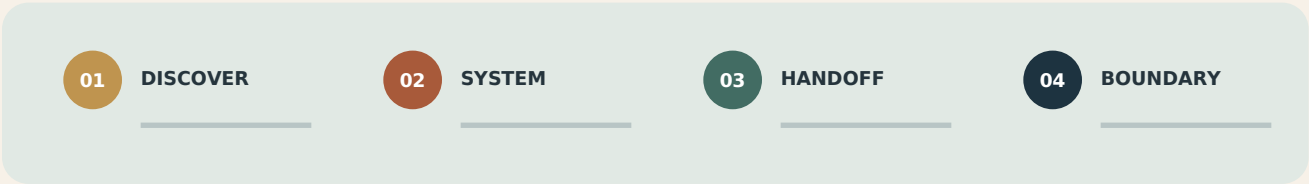


Sell clarity and calm structure, not accounting services. Help owners who are already working hard get the numbers and the basic compliance under control so they can decide the next move (grow, stabilize, or prepare for brick-and-mortar) with clear information.



CATCH-UP BOUNDARY | Structure the document sequence while the owner performs the work and a qualified professional reviews accu

6. Immediate Next Step - Proof of Concept

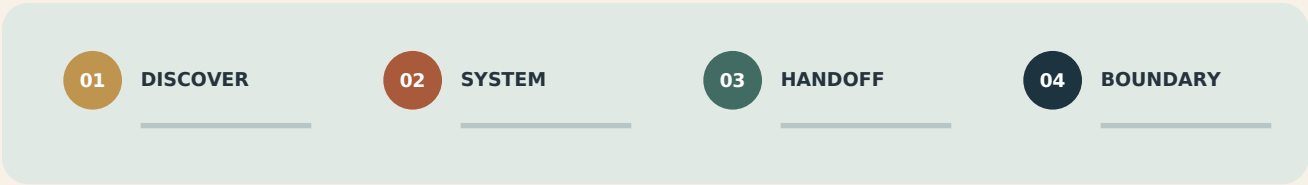


Use one consenting pilot client as the proof-of-concept case. Once the client completes the filing steps and payment arrangements are in place, the provider will have a real example of the full Clarity Kit plus Tax Catch-Up sequence working. Obtain written permission before using any client result in marketing [VERIFY].

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CORE REFERENCE

Clarity Kit Tier Reference

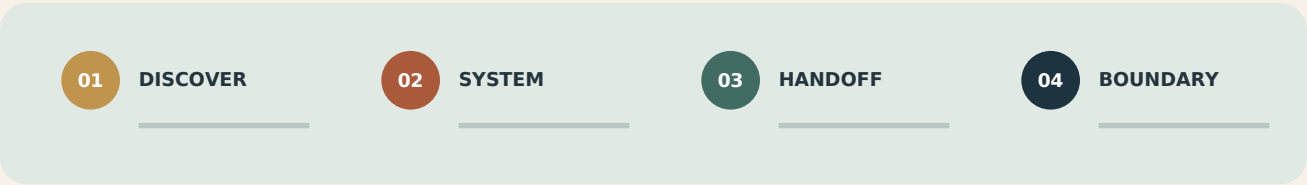


Use the source tiers as the offer structure. Confirm workload, client fit, software, support limits, and margin before publishing prices.

Tier	Price	Included
Basic	\$197	Custom weekly tracker; simple monthly fixed-cost sheet; one-page instructions and short walkthrough
Standard	\$397	Everything in Basic; inventory or reorder tracker; receipt organization system; 30-day check-in
Complete	\$597	Everything in Standard; cash-versus-card tracking; year-to-date summary; extra customization and follow-up support

CORE REFERENCE

Tax Catch-Up Add-On Reference



The service provides guides and orientation while the owner performs the work. Confirm scope, competency, disclosures, and referral boundaries before offering it [VERIFY].

Offer	Source Price	Positioning
Stand-alone	\$297-\$397	Guides plus a short orientation call
Bundled with any Clarity Kit	\$197-\$247 add-on	Owner uses free tools; value is structure, sequence, and reduced overwhelm

WORKSHEET 01

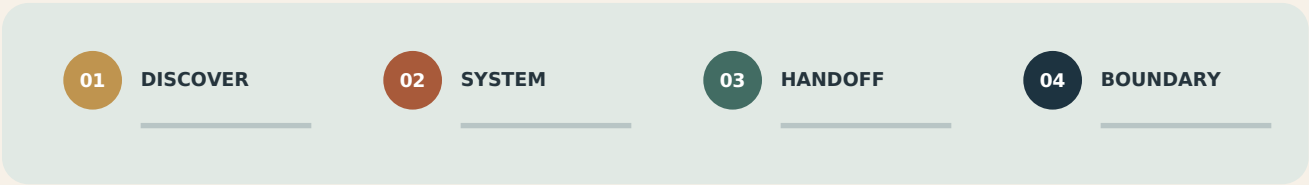
Startup Checklist



DONE	ACTION	OWNER DATE NOTES
☐	Define the core deliverable: weekly sales, costs, profit, fixed expenses, instructions, and walkthrough.	
☐	Choose the initial tier and write exact inclusions, exclusions, revision limits, support period, and client responsibilities.	
☐	Build a reusable discovery form, locked tracker template, fixed-cost sheet, inventory option, receipt system, and handoff checklist.	
☐	Check licensing, zoning, and tax rules for your own city and state before starting.	
☐	Confirm business-consulting, bookkeeping, tax-information, tax-preparation, privacy, data, insurance, advertising, and record rules [VERIFY].	
☐	Obtain professional liability, cyber, general liability, and business-property coverage quotes [VERIFY].	
☐	Write a plain boundary: the service provides structure and information, not tax preparation, filing, legal opinions, or guaranteed outcomes [VERIFY].	
☐	Create a qualified referral path for tax, accounting, legal, payroll, and software issues outside the engagement.	
☐	Pilot the package with one consenting business and record time, questions, revisions, adoption, and results without inventing a testimonial.	
☐	Create secure intake, access, storage, sharing, backup, retention, deletion, incident, and offboarding procedures [VERIFY].	
☐	Track conversion, delivery hours, client adoption, 30-day follow-through, referrals, support load, and gross margin.	

WORKSHEET 02

Software and Budget Worksheet



DELIVERY KIT | Standardize discovery, tracking, receipt organization, walkthroughs, follow-up, privacy, and records.

ITEM	NEEDED	ESTIMATE	ACTUAL	NOTES
Business formation, licenses, tax setup, contracts, and professional review [VERIFY]				
Professional liability, cyber, general liability, and business-property coverage [VERIFY]				
Computer, monitor, backup, secure storage, encryption, updates, and replacement reserve				
Spreadsheet, document, PDF, meeting, scheduling, accounting, payment, and e-signature tools				
Domain, website, business email, phone, booking, intake, and client portal [VERIFY]				
Discovery, tracker, fixed-cost, inventory, receipt, year-to-date, guide, and handoff templates				
Tax-information training, professional review, referral relationships, and continuing education [VERIFY]				
Marketing, sample package, printed materials, networking, pilot delivery, and client acquisition				
Bookkeeping, merchant fees, taxes, legal review, privacy, security, and record management [VERIFY]				
Contractor or administrative support, quality review, accessibility, and client support [VERIFY]				
Working capital, refunds, rework, data incident, downtime, claims, and emergency reserve				

BUDGET CONTROL

TOTAL ESTIMATE: _____ TOTAL ACTUAL: _____ CASH RESERVE: _____

WORKSHEET 03

Pricing and Estimate Template



CLIENT	SERVICE LOCATION	ESTIMATE NUMBER	DATE

SERVICE OR INPUT	BASIS	AMOUNT
Discovery and data review	Scope and hours	
Weekly profit tracker	Basic or customized	
Fixed-cost sheet	Basic or customized	
Inventory or reorder tracker	Included tier or add-on	
Receipt organization system	Included tier or add-on	
Cash, card, and year-to-date summary	Included tier or add-on	
Walkthrough and written instructions	Length and format	
30-day check-in or support	Duration and limits	
Tax catch-up guides and orientation [VERIFY]	Stand-alone or bundled	
Total estimate		

TOTAL ESTIMATE	DEPOSIT OR AUTHORIZATION	VALID THROUGH

WORKSHEET 04

Client Engagement and Boundary Agreement

01DISCOVER

02SYSTEM

03HANDOFF

04BOUNDARY

FIELD	AGREED DETAIL
Client, business, owner, contact, billing, decision-maker, and service dates	
Selected tier, deliverables, add-ons, file formats, walkthrough, check-in, support, and revisions	
Business questions, current system, weekly routine, sales channels, costs, inventory, receipts, and goals	
Client-provided data, completeness, accuracy, access, deadlines, corrections, and responsibility	
Tracker fields, formulas, locked areas, input cells, instructions, assumptions, and version control	
Tax catch-up guides, orientation, owner-executed tasks, professional review, and excluded services [VERIFY]	
No tax preparation, filing, legal opinion, audit representation, accounting assurance, or guaranteed result [VERIFY]	
Qualified-professional referral triggers and client responsibility to obtain advice [VERIFY]	
Fee, deposit, payment schedule, cancellation, refund, delay, change order, and additional support	
Confidentiality, privacy, data access, passwords, sharing, backup, retention, deletion, and breach response [VERIFY]	
Third-party software, free tools, availability, subscriptions, limitations, outages, and client accounts	
Ownership, license, reuse, customization, client data, template protection, and portfolio permission [VERIFY]	
Acceptance testing, walkthrough completion, handoff, owner confirmation, and 30-day follow-up	
Dispute, liability, professional review, governing terms, and legal-review notice [VERIFY]	
Client and provider signatures	

WORKSHEET 05

Invoice Template



BUSINESS	CLIENT	INVOICE NUMBER	DATE DUE

DESCRIPTION	QUANTITY	RATE	AMOUNT
Basic Clarity Kit			
Standard Clarity Kit			
Complete Clarity Kit			
Tax Catch-Up stand-alone			
Tax Catch-Up bundled add-on			
Additional customization			
Follow-up support			
Approved additional work			

SUMMARY	AMOUNT
Subtotal	
Tax [VERIFY]	
Credits / adjustments	
Total	
Balance due	

WORKSHEET 06

Job Log and Lead Tracker

01

DISCOVER

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BOUNDARY

DATE	LEAD SOURCE	NEED OR SCOPE	QUOTE	STATUS NEXT STEP

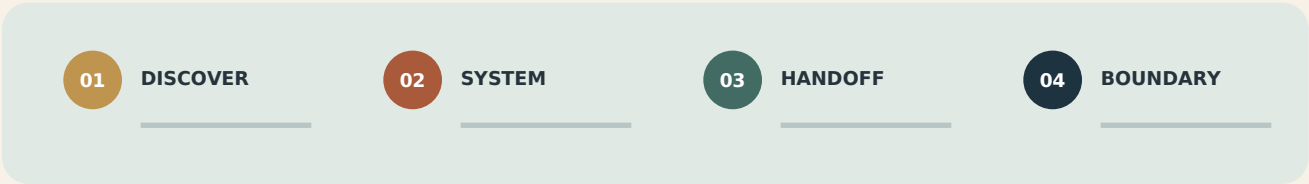
DATE	LEAD / CLIENT	TIER	STATUS	ADOPTION	REFERRAL

ONE METRIC

CLIENT ADOPTION AT 30 DAYS: _____ DELIVERY HOURS: _____ REFERRALS: _____

WORKSHEET 07

Clarity Kit Compliance and Client Protection



Check licensing, zoning, and tax rules for your own city and state before starting.

CHECK	CONTROL	INITIALS NOTES
☐	Licensing, zoning, tax, consulting, bookkeeping, tax-information, tax-preparation, privacy, data, and local rules are confirmed [VERIFY].	
☐	Professional liability, cyber, general liability, property, subcontractor, and client-required coverage are confirmed [VERIFY].	
☐	Written scope distinguishes business organization and education from tax preparation, filing, accounting assurance, legal advice, and representation [VERIFY].	
☐	Marketing does not promise refunds, penalties, relief, filing acceptance, balances, financing, growth, compliance, or other results outside the provider's control.	
☐	Client identity, consent, data ownership, access, passwords, transmission, storage, backup, sharing, retention, deletion, and breach response are documented [VERIFY].	
☐	Templates, formulas, locked cells, inputs, assumptions, calculations, tests, instructions, versions, corrections, and handoff are quality-controlled.	
☐	Tax catch-up support uses current official sources, preserves client control, documents limitations, and triggers qualified review when needed [VERIFY].	
☐	Fees, deposits, revisions, support limits, third-party tools, referrals, conflicts, confidentiality, and complaints are documented before work.	
☐	Work stops when the requested task crosses the authorized scope, competency, privacy, data, tax, accounting, legal, or insurance boundary.	

STOP RULE

Do not begin or continue an engagement until scope and exclusions are written, client data can be handled securely, the provider is competent for the promised system, professional boundaries are clear, coverage applies, and any tax, accounting, or legal task outside scope is referred appropriately.