STONEBRIDGE LEDGER
& ADVISORY SERVICES

PR-007 | DRAFT

Built by GEN Systems. Run on Business Hub OS. At home in FlowState.

What We Have Built for Stonebridge So Far

A full record of the Stonebridge system to date: the audit, the packet, the dashboard, the CRM, the agent, the assessment, and the campaign, with the honest list of what each next step is waiting on.

Prepared for: Brian Goldrick, Stonebridge Ledger & Advisory Services, Gilbert, Arizona
Firm: Bookkeeping · Controller services · Fractional CFO
FlowState member no.: 596451
Date: November 2, 2026
Status: DRAFT. Nothing in this document has been sent or published; it awaits Anton's approval.

01 Where Stonebridge stood: the audit

The work began with a presence and systems review, delivered October 15, 2026. Its own figures, dated to that review: system activation 57%, onboarding 79%, presence coverage 67%, and Google reviews on record: 0. The firm's Google rating had never been measured, because there were no reviews yet to measure.

The firm itself was strong. The system around it was not: pieces of the presence existed, but they were not connected, not measured, and not following up on their own. The audit lives in the packet as the Fix Plan.

02 The packet: one home for the whole project

- Everything Map: a single map of every page, system, and deliverable in the Stonebridge build, kept current.
- Start Here guide: what each piece is, in what order to look at it, and where Brian's decisions are needed.
- Fix Plan: the audit turned into a plan, each gap with its fix and its order.
- Proposal Guide: how Stonebridge's own offers fit together, ready to carry Brian's real assessment content when his workbook lands.
- Also in the packet: the GEN Systems layer page, the private label catalog, the year-end campaign pages, and the Five Pillars campaign material.
- Packet: stonebridge-ledger-project.vercel.app

03 FlowState: dashboard and workspace

Stonebridge holds FlowState member number 596451, with its own identity colors (gold primary, deep gold secondary, azure vein) inside the Mother Marble orb system.

- Dashboard: Brian's activation, onboarding, and presence figures from the audit, so progress is measured against the same baseline. flowstate.businesshubos.com/dashboard/stonebridge/
- Workspace: his working home inside FlowState, skinned in Stonebridge navy and gold. flowstate.businesshubos.com/workspace/stonebridge/

04 The meeting room (preview)

The branded room is built: the space, the agent seat, in-room chat, call controls, a recording consent gate, and invite copying. Live camera and microphone media is not yet provisioned, so the room is honestly labeled a preview until that rail is chosen and wired. flowstate.businesshubos.com/meet/stonebridge/

05 His CRM: his account, his rules

- Brian is an Admin on his own CRM account; he accepted the invite and can run everything in it.
- Pipeline: New inquiry, Conversation booked, Readiness review, Managed Accounting.
- Ten Gilbert example leads are loaded, marked as examples in their notes. No outreach has ever been sent to them.
- Customer-facing AI features are deliberately switched off, including the smart receptionist that was on by default. Nothing contacts his clients automatically.

- The Five Pillar assessment intake form already exists inside the account.
- Client financial information stays private inside Brian's own accounts.

06 Ask Stonebridge: his agent

Text chat is live today. The agent is trained only on Stonebridge material, with the Orus voice (professional and warm) and his gold orb configured for voice. It invents nothing: no prices, no claims, no credentials that are not his. One on-device talk test on Brian's own phone remains the last voice check. orb.businesshubos.com/client?agent=mfa_b997be59b6904108b3f8

07 The Five Pillar assessment: demos ready, production waiting on one thi

The assessment experience is built in three layouts, with 35 questions across the five pillars, seven per pillar. Those questions are samples, labeled as samples everywhere they appear, because the real questions are Brian's: they live in his Five Pillar workbook. The moment the workbook arrives, the samples come out and his go in. Demo: stonebridge-ledger-project.vercel.app/assessment/demo/

The public address, assessment.stonebridgeledger.com, is attached and prepared on our hosting side. One DNS record on Brian's side completes it, and a guided prompt for exactly that step is already in his hands. His live website stays untouched until he approves otherwise.

08 The combined website preview

At Brian's request, a preview merging his current live webpage with our designed version, assessment included. It sits on our staging site, bannered as a preview; his live website has not been changed. Where his original copy conflicted with this system's content rules, the preview generalizes rather than publishes (a revenue range became "growing revenue"). It waits on Brian's read. stonebridge-ledger-project.vercel.app/combined-preview/

09 The campaign: built, and held for his word

A full campaign is built: competitor and platform research, the blueprint, the first content batch, landing pages, social images, a presenter reel, and short video ads. None of it has been published. Publishing waits on Brian's line-by-line approval of the exact posts.

- LinkedIn, Brian personally: Connected, October 27, 2026.
- LinkedIn, Stonebridge company page: Connected, October 30, 2026.
- Facebook, Stonebridge page: Connected, October 29, 2026.
- Google Business profile: Connected, October 27, 2026.

Connected is not the same as publishing: nothing has been posted to any of them.

10 Founding 42: the membership this all runs under

Brian already holds the Founding 42 agreement and payment link, sent October 28, 2026. The membership activates on his signature and first payment. Terms, exactly as sent:

- $420 per month.
- Covers up to two businesses. Stonebridge Ledger is named first; Brian may name the second later at no change in price.
- His CRM, as described in section 05.
- His AI agent, Ask Stonebridge, trained only on his own material.
- Five social channels included; each extra channel is $10 per month.
- Unlimited blogging.
- FlowState registry and dashboard, member number 596451.
- His Knowledge Vault and training folder.
- Community access.

Unlimited means build access. Builds are not metered. Usage is: AI calling, texts, media, and similar consumption run on included credits and caps, overages bill on use, and phone lines and their setup are extra. There are no other prices anywhere in this proposal.

11 What comes next, and what each step waits on

- The workbook unlocks the assessment (waiting on Brian). Outstanding since October 1, 2026. Brian has a podcast in mid November and wants listeners able to take the assessment afterward, with the episode also going out as a YouTube video. Build order: workbook in, real questions in, his approval of the final version, then the assessment goes live at its prepared address, with leads landing in his own CRM.
- The combined preview verdict (waiting on Brian). Approve it, mark changes, or pass. His live site stays untouched until he chooses.
- One booking link (Brian's pick). His site points to Calendly; his signature offers Microsoft Bookings; a CRM booking calendar has been specced as well. One source should win.
- Publishing begins only with his approval (by design, forever). Brian sees the exact thing first and approves it, or it does not ship.
- Smaller open items: his business mailing address and a headshot for his CRM and profiles; the optional registrar move (registration only, email stays on Microsoft 365, no mail records change) against staying at Namecheap, which is fine; and the final Ask Stonebridge voice test on his own phone.