

The BlackCloak Tax Season Playbook for Households

This playbook gives assistants, household staff, and advisors clear guidance for handling tax-related requests without hesitation or confusion.



The non-negotiable rule

No financial changes or sensitive information are to be shared without verification. If you do receive a request, use the following approved response script:

"I can't take action on this request right now. I will verify and call you back using our established contact information."

There are no exceptions to this response and do not provide any explanations beyond this to whomever is contacting you.

Steps to verify a contact's identity

- Do not reply directly to the message
- Contact the principal or designated verifier immediately
- Use known phone numbers or internal systems only
- Document the request with screenshots or notes

Requests that always require verification are:

- Changes to bank or payment details
- Requests for tax documents or ID
- Urgent deadlines or secrecy requests
- New email addresses or phone numbers for known contacts

Red flags to escalate immediately

- Pressure to act quickly or quietly
- Requests that bypass normal process
- Links or attachments that were not expected
- Requests involving gift cards, wires, or unusual payments

If you think you've made a mistake

- Stop further action immediately
- Preserve messages, emails, and documents
- Notify the principal and cybersecurity support

Reminder for staff

Your role is to protect the household by slowing things down. Verification is always the right answer.