



ACT 60 SPRINT

FILING-READINESS, MADE UNMISTAKABLY CLEAR.

SAMPLE FILING-READINESS PACKET

Everything organized. Nothing left to chance.

A single, audit-grade record of your facts, documents, and advisor handoffs — assembled so your professionals can move at full speed.

EVIDENCE INDEXED END-TO-END

BUILT FOR YOUR CPA

ILLUSTRATIVE SAMPLE ONLY

34

EVIDENCE ITEMS INDEXED

100%

OWNERS ASSIGNED

97

DAYS TO TARGET

3

ADVISORS COORDINATED

ILLUSTRATIVE SAMPLE

PREPARED FOR ELENA MORALES

WHY THIS PACKET

What this packet does for you

When your licensed professionals open this file, every fact is sourced, every document is named, and every open question already has an owner.

01

Decision-ready clarity

Walk into every advisor conversation with a complete, organized record — so the discussion is about your decisions, not about chasing missing paperwork.

02

Audit-grade record

Each item is sourced, dated, and traceable to its document. Your professionals review organized evidence instead of reconstructing it from scattered inboxes.

03

Weeks, not months

A sequenced 2026 plan turns a sprawling relocation into a series of small, scheduled steps — momentum you can see week over week.

04

Done with you

We assemble, index, and chase the open items. You upload and approve. The heavy organizing work sits with us, not on your calendar.

FROM SCATTERED TO SETTLED

BEFORE

Documents scattered across email and drives

No single view of what is missing

Advisors waiting on you for basics

WITH ACT 60 SPRINT

One indexed record, every item sourced

Live status on every open item

Advisors handed a complete, organized file

OUR STANDARD

Our operating standard: every item in your record is sourced, dated, owner-assigned, and status-tracked, and you receive a written status each week. We organize and coordinate; your licensed professionals own all advice, review, and conclusions.

SECTION 01

Matter snapshot — Elena Morales

A coherent picture of the engagement at a glance — who is involved, what is planned, and where the record stands today.

34 EVIDENCE ITEMS INDEXED	100% OWNERS ASSIGNED	97 DAYS TO TARGET	3 ADVISORS COORDINATED
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Field	Value
Client	Elena Morales, Founder & CEO
Company	Meridian Ledger Labs, Inc. (Delaware C-corp)
Current residence	Austin, Texas
Relocation under evaluation	San Juan, Puerto Rico
Target move-in date	October 1, 2026
Licensed CPA	Thomas Whitaker, CPA — Whitaker & Chen LLP
Wealth advisor	Jordan Kim, CFP — Northline Private Wealth
Packet status	Filing-readiness in progress — illustrative sample

RECORD-COLLECTION PROGRESS (SAMPLE)

Identity & residency records

80%

Equity & cap-table records

65%

Digital-asset records

45%

Advisor handoff preparation

70%

Document-organization progress only — not an eligibility, residency, or tax measure.

WHY IT MATTERS

Founder equity, digital-asset records, day-count tracking, housing, and cross-advisor coordination — organized in one place. This packet does not determine eligibility or tax treatment.

SECTION 02

Evidence index

Every document in one indexed view, each item sourced, owner-assigned, and status-tracked so nothing slips.

ID	CATEGORY	DOCUMENT / ARTIFACT	OWNER	STATUS	NEXT DATE
E-001	Identity	U.S. passport and Texas driver license	Client	Received	2026-07-08
E-003	Tax history	2024 and 2025 federal returns (Forms 1040)	CPA	Requested	2026-07-15
E-006	Residency	2026 day-count travel log (calendar export)	Client	In progress	2026-07-12
E-009	Housing	Draft 24-month San Juan lease — Condado	Client	Open	2026-07-22
E-011	Residency	Austin home listing or lease-out plan	Client	Drafted	2026-07-25
E-014	Equity	Carta cap table and grant history export	Client	Received	2026-07-10
E-016	Basis	Founder-share cost-basis support	CPA	Requested	2026-07-18
E-018	Digital assets	Coinbase, Kraken, and self-custody wallet exports	Client	Partial	2026-07-19
E-020	Banking	Statements for U.S. and planned PR accounts	Client	Open	2026-07-26
E-022	Business	Customer revenue map by location of service	Client	Drafted	2026-07-21
E-025	Business	Payroll and contractor roster summary	Client	In progress	2026-07-23
E-028	Handoff	Puerto Rico professional intake summary	Sprint	Draft	2026-07-24
E-031	Handoff	CPA coordination letter and question list	Sprint	Sent	2026-07-16
E-034	Decisions	Decision log and open-questions register	Sprint	Maintained	Weekly

OPERATING
STANDARD

Every open item has an owner, a next date, and a visible handoff path.

SECTION 03

Project plan

A sequenced 2026 path that turns a complex relocation into scheduled steps you can watch move week over week.

DATE	MILESTONE	WHAT THE CLIENT RECEIVES
2026-07-07	Kickoff and intake	Welcome brief, secure workspace, and your matter snapshot
2026-07-16	Advisor coordination	CPA letter and organized question list, sent and logged
2026-07-24	Evidence index v1	First complete index of documents with owners and statuses
2026-08-07	Gain and asset organizer	Structured record of holdings with questions routed for review
2026-08-21	Housing and residency file	Lease, travel log, and day-count records assembled in one place
2026-09-04	PR professional handoff	Intake summary prepared for your Puerto Rico licensed professional
2026-09-18	Pre-move readiness review	Consolidated record check and a punch-list of remaining items
2026-10-01	Move-in window	Updated residency tracker keyed to your target move date
2026-11-13	Year-end coordination pack	Organized file refreshed for your advisors' year-end planning
2026-12-15	Final readiness handoff	Complete, indexed record delivered to your professionals

WHAT YOU CAN
COUNT ON

Momentum you can see week over week — without any promise of a filing outcome.

SECTION 04

Gain & asset organizer

A rigorous, organized record of your holdings — explicitly not a tax calculation, valuation, or eligibility determination, which belong to your licensed professionals.

ASSET	ILLUSTRATIVE SAMPLE DETAIL	RECORDS ON FILE	QUESTION ROUTED TO LICENSED REVIEW
Meridian Ledger founder shares	450,000 shares; planned secondary at \$8.40/share (illustrative)	Carta export, board consent draft	How should pre-relocation appreciation records be documented?
Digital asset portfolio	BTC 14.2, ETH 118; lot history partial before 2021	Coinbase and Kraken exports, wallet CSVs	What records close the pre-2021 lot-history gaps?
U.S. consulting revenue	~\$38,000/month forecast from mainland customers	Draft customer-location map	Which sourcing questions belong with the PR professional?
Brokerage holdings	Diversified taxable account, mixed long-term lots	Fidelity year-end statement, realized-gain report	What basis and holding-period records should be on file?
Private fund interests	Two LP positions, capital-call schedule active	Subscription docs, latest K-1s	What transfer or notification records are needed?

BOUNDARY

We organize records and frame questions. Tax calculations, valuations, sourcing opinions, and eligibility determinations belong to your licensed professionals.

SECTION 05

CPA coordination letter

Your professionals receive a complete, organized starting point, so coordination is fast and the open questions are already framed.

ACT 60 SPRINT

Filing-readiness, made unmistakably clear.

Date: July 16, 2026

To: Thomas Whitaker, CPA — Whitaker & Chen LLP

Re: Elena Morales — organized records and coordination request

On behalf of Elena Morales, we are assembling an organized filing-readiness record as she evaluates a relocation to Puerto Rico. This letter shares the documents already on file and lists the items we are gathering, so your review can begin from a complete and clearly sourced starting point.

Attached is the current evidence index with owners, statuses, and dates, alongside a structured organizer of her holdings and a register of open questions. We have flagged several items — founder-share basis support and a few items routed to a Puerto Rico licensed professional — that fall to your professional judgment and to PR-licensed review.

We do not provide tax, legal, or eligibility advice and offer no conclusions here. Our role is to keep the record organized, sourced, and current so that you and Ms. Morales's other advisors can work efficiently. Please tell us what additional documentation would be most useful, and we will incorporate it and keep you updated.

**With appreciation,
The Act 60 Sprint Engagement Team**

Enclosures · Evidence index (34 items) · Gain & asset organizer · Open-questions register

COORDINATION

A clean, non-advisory starting point so your CPA's time goes to judgment, not document chase.

SECTION 06

Decision log & weekly status

DATE	DECISION / ITEM	OWNER	STATUS	NEXT ACTION
2026-07-08	Engage existing CPA for basis and return review	Client	Approved	CPA letter sent and logged
2026-07-10	Set San Juan target move-in for October 1	Client	Open	Confirm lease timeline (E-009)
2026-07-12	Digital-asset records incomplete before 2021	Client	Blocked	Export full wallet history (E-018)
2026-07-15	Route revenue-sourcing questions to PR professional	Sprint	Queued	Include in handoff packet (E-028)
2026-07-21	Maintain Austin residence as lease-out, not sale	Client	Under review	Add lease-out plan to file (E-011)
2026-07-24	Adopt weekly written status cadence	Sprint	Active	Deliver Week 3 status Friday

Week 3 status Elena Morales filing-readiness

Completed	Evidence index v1 published; CPA coordination letter sent and logged; identity and cap-table documents received.
In motion	Travel log and day-count records being assembled; partial digital-asset exports under reconciliation; draft customer-location map in review.
Next	Finalize San Juan lease timeline, close pre-2021 wallet history, and prepare the Puerto Rico professional intake summary.
Timeline note	On schedule against the project plan; this is a project-management status only, not an eligibility, residency, or tax conclusion.



ACT 60 SPRINT



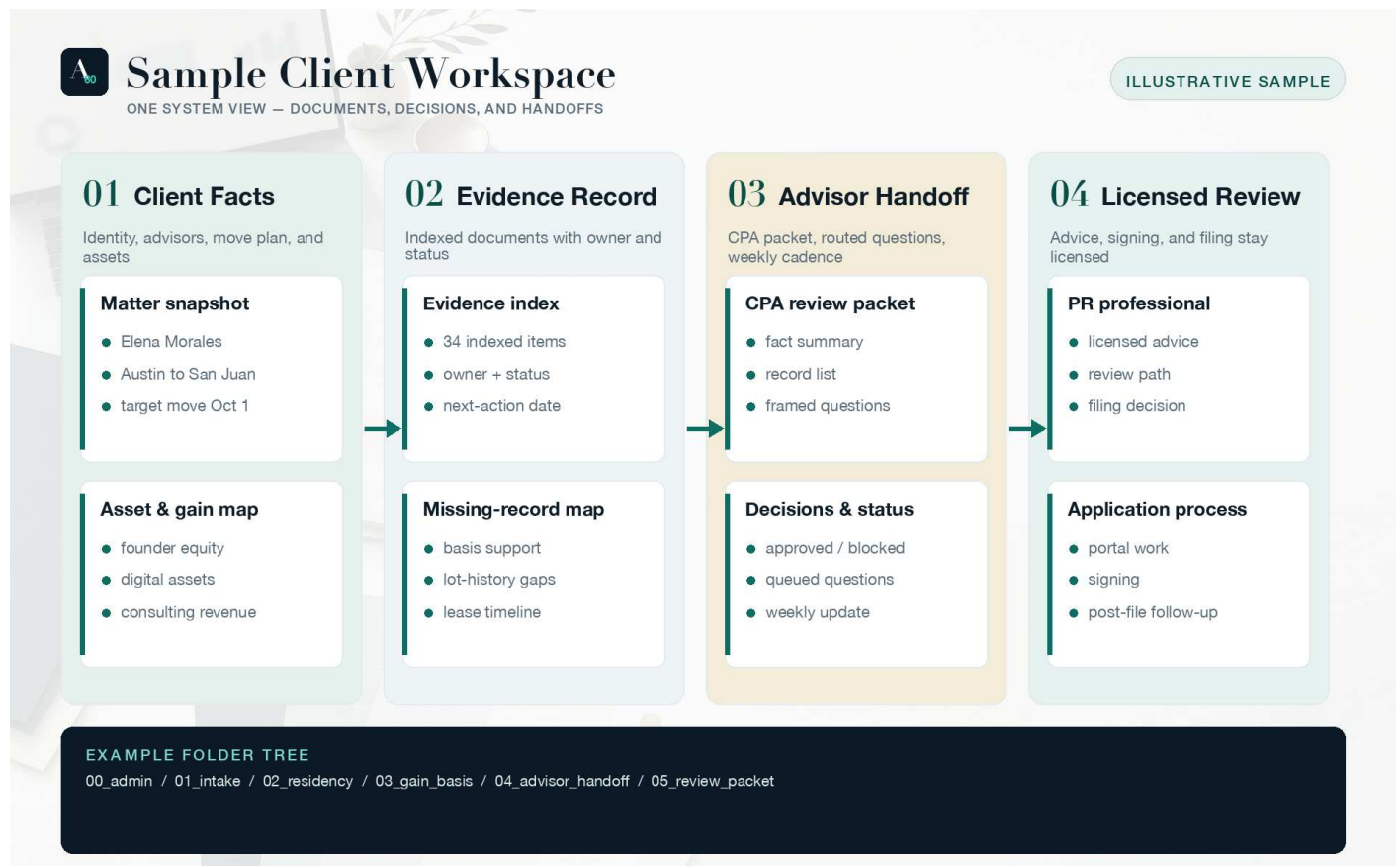
When the record is this organized,
your advisors can move at full
speed.

OUR OPERATING PRINCIPLE



SECTION 07

Your client workspace

**SYSTEM VIEW**

Intake facts flow into an evidence record, then advisor handoff, then licensed review. That flow is the product.

SECTION 08

What you receive

Six client-facing deliverables that turn a complex relocation into one organized, reviewable record.

01

Evidence Index

A complete record of every document — each item sourced, owner-assigned, and dated for its next action.

02

Project Plan

A sequenced 2026 path from kickoff through final handoff, so progress is visible week over week.

03

Gain & Asset Organizer

Your holdings organized in one structured view, with the open questions routed for licensed review.

04

CPA Coordination Letter

A plain-English, ready-to-send request that frames exactly what your CPA needs to review.

05

Decision Log

Approvals, blockers, and routed questions — captured, owned, and kept current.

06

Weekly Status

Completed, in motion, and next — delivered to you in writing every week.

ROLE BOUNDARY

Not a CPA or attorney replacement — a cleaner, complete file for licensed review.



ACT 60 SPRINT

FILING-READINESS, MADE UNMISTAKABLY CLEAR.

Your record, ready when you are

You have seen how an organized filing-readiness record looks: every fact sourced, every document named, every open question owned. When you are ready, we build this around your situation and keep it current through your move. Your only jobs are to upload, review, and decide.

Schedule your intake to begin your record.

Illustrative sample only. Act 60 Sprint organizes facts, documents, timelines, evidence, and advisor handoffs. We do not provide legal, tax, accounting, investment, eligibility, filing, or Puerto Rico Act 60 advice. Your own licensed CPA and a Puerto Rico licensed professional are responsible for all professional review, advice, signing, filing, and conclusions. No approval, tax rate, savings amount, deadline treatment, or outcome is promised.