

DAVIS&DAVIS A d v i s o r s

Everything a small business
owner needs, all in one place

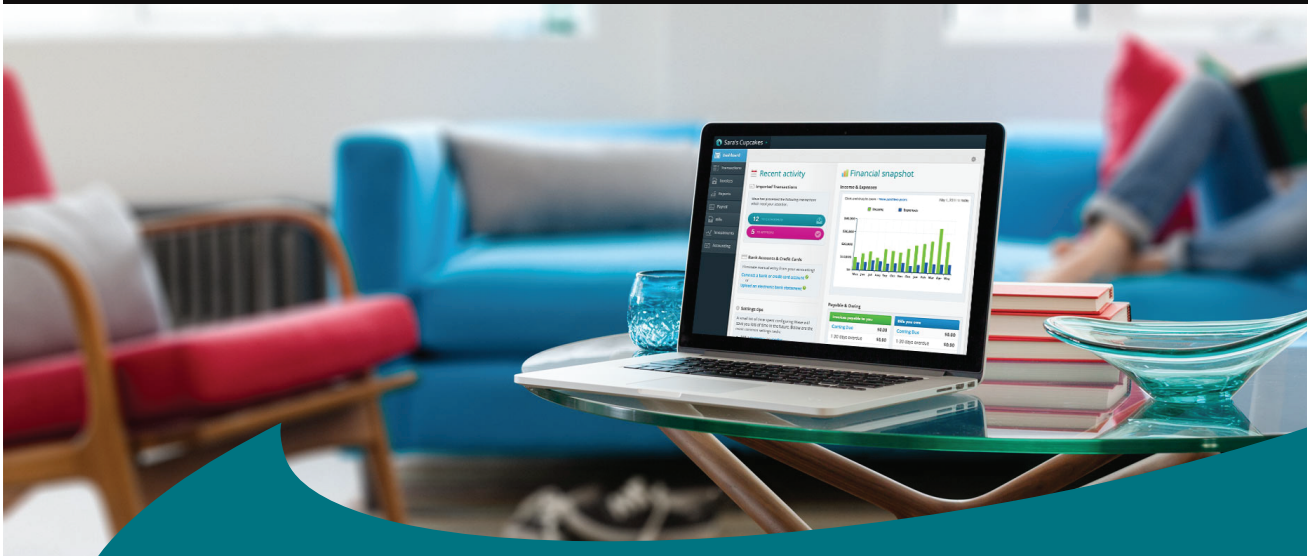
ACCOUNTING

INVOICING

PLANNING

RECEIPTS

CREDIT



Join 2.5 million users and see for yourself just
how simple business expenses can be.

davisndavisadvisors.com

DAVIS&DAVIS A d v i s o r s

Davis&Davis offers cloud-based accounting software that is a great fit for your business. You can add me as a collaborator, so I can have access to your account and we can both work on your financials from anywhere- or we can manage the system for you! This is a fantastic toolkit, and I think it will add a lot of value to your business. The Accounting and Invoicing tools are optional - which save you money down the road.



ACCOUNTING

- Connect your bank account for up-to-date insights
- Real double-entry accounting
- Generate financial reports and more!



INVOICES

- Customizable invoices and estimates
- Generate recurring invoices
- See status reports on whether invoices have been viewed, paid, or sent



PAYMENTS

- Accept all credit cards
- Allow customers to pay directly through invoices
- Fully integrated with your accounting

Available US, Can and UK



RECEIPTS

- Upload receipts from your phone, via email or from the web app
- Receipts automatically flow into your accounting
- Original receipt image is always available



PAYROLL

- Run payroll on your computer or iPhone
- Pay employees by direct deposit
- Employee portal for accessing pay stubs

Available in US and CAN



PERSONAL

- Manage personal budgets
- Track investments
- Easily separate personal transactions from your business

Three Easy Steps to Get Started:

- 1 Sign up with a deposit today!**
- 2 Give us your receipts**
- 3 Connect your bank account**

@Davisadvisors Facebook.com/Davis&Davis



Choose a Plan

Your Davis&Davis membership will automatically renew until a request to terminate is received in writing.

Individual

Business

When you join, you will also have Receipts, which sends your receipts to the cloud so you can access it a later date.

DAVIS&DAVIS
A d v i s o r s

Personal Finance

Separate business & personal transactions. Simple budgeting and investment tracking

**Receipt Scanning**

Uploads receipts from your phone, via email or from the web-app. iOS & Android apps available. No more boxes of paper

**Double-Entry Accounting**

Enhance your business by connecting your bank, bank reconciliation, journal transactions, and more!

**Reports**

Without financial reports your business won't be eligible for financing or outside capital. Get your books organized

**Professional Invoicing**

Customizable templates with company logo, Estimates & Reminders, Recurring invoicing, integrated with your Accounting system. See status reports (viewed, paid, or sent)

**Credit Card Processing**

Accept credit cards. Allow customers to pay directly through invoices. 2.9% +.30c per transaction

**LenderMatch**

An advisor can help you find business capital to grow and expand your operation

**Dropbox Integration**

Share and review bank statements with an advisor in a confidential environment

**Payroll**

Maximize your time with easy payroll processing and direct deposit. Run payroll on your computer or iPhone. Available in US & Canada

**Guest Collaborator**

Our team provides training and phone support to help you understand and manage your accounting system. \$200 p/m



The monthly membership fee for **Davis&Davis** is based on your package selection. Please provide your payment information below.

You can fax this Payment Form to **800-791-4028**; or you can mail or bring this form to our Corporate office located at:

Davis&Davis Credit Advisors, LLC

Lake Presidential
15126 Nancy Gibbons Terrace
Upper Marlboro, MD 20774
800-791-4028

Payment paid by: ☐ Check ☐ Credit Card

Date	
Name	
Address	
Primary Phone	
Credit Card Type	
Credit Card #	
Expiration Date	
Security Code	
Email	

Deposit	Balance	Monthly Fee	Source