



# DavTech, Inc.

Insurance, Accounting and Risk Solutions

## Capability Statement

DavTech, Inc. offers a range of insurance, risk management and accounting solutions. Our services are focused in the following major areas: Accounting, Tax and Bookkeeping Services, Business Consulting and Insurance, Bond and Risk Management Placement and Services.

Our clients count on us as their most trusted partner advisor for accounting, tax, business and insurance consultation.

### Certifications

- Disadvantaged Business Enterprise (*DBE*) Certified by Department of Transportation (DOT)
- Women Owned Small Business (*WOSB*)
- Minority Owned Small Business (*M/WBE*)

### Core Competencies

#### Accounting and Tax Services

- Accounting and Bookkeeping Assistance
- Financial Statement Reporting
- Budget Planning and Forecasting
- Financial Modeling
- Cash Flow Planning
- Tax Preparation and Planning

#### Business Consulting

- Management Consulting
- Project Planning
- Profitability Solutions
- Administrative Support

#### Insurance and Risk Management

- Property/Casualty Insurance Brokerage
- Construction and Builders Risk
- Risk Management Services and Consultation
- Bond Placement

#### NAICS Codes

- 541211- Certified Public Accountants
- 541213- Tax Preparation Services
- 541214- Payroll Services
- 541219- Other Accounting Services
- 541611- Administrative Management &
- 541618- Other Management Consulting

### Current and Past Projects

#### **(METRO) Metro Area Transit Authority of the City of Omaha**

- Insurance and Risk Management Consultation
- Contract Review for Insurance Provisions
- Broker Services and Insurance Placement
- Placement of all Property and Casualty lines to include
  - ◊ General, Auto Liability & Property
  - ◊ Excess Workers Compensation
  - ◊ Public Official Bonds

#### **Metro Area Planning Agency**

- Contract Review for Insurance Provisions
- Broker Services and Insurance Placement

#### **City of San Antonio Airport Consulting Project**

- Insurance Consulting for CCIP implementation
- Negotiated Contract Savings

#### **Contractor Development Services- Austin Project**

- Quality Assurance and Data Analysis in respect to the volume, types and placement of bonds for a surety support program. The procedures included data sampling and verification of their extensive interactive database and files. It also included a review of the reporting structure and recommendations for database efficiency and accuracy.

#### **Davis Insurance Agency, Inc.**

- Insurance Agency administration, staffing and client outreach and support; Financial and Strategic Analysis; Operational Analysis and Recommendations

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