



CELEBRATING 20 YEARS OF DAVIES TRACEY

...WITH OUR 'DT TOP 20'

Summer 2022 saw us reach the milestone of 20 years in business, something the whole team at Davies Tracey is proud of. You can read more about this *by clicking here*, but read on for our **DT Top 20** - a list of the things we're particularly happy to have achieved in our time so far.

Davies Tracey has:

1

Helped 24 people pass their accountancy exams (and are still going). As well as covering costs, the team work around time off needed and give up their own time to help people revise.

4

Throughout 2022, paid approximately 2000 people regularly, accurately and on time - through DT payroll, the firm's outsourced payroll service.

6

Offices on Teesdale Business Park which they proudly moved into in 2012, and new offices in Stokesley, where clients are always welcome for a cuppa.

8

A Strategy Group where staff have their input into the everyday running of the business. We listen to and value our people.

2
&
3

Long-lasting client relationships including some with connections of over 100 years, working with 3rd or 4th generations of businesses.

Our roots go back this far through the acquisition of Gilchrist Tash in 2012, who were established in the 1870s.

5

Raised over £40k for local charities, and helped the community in other ways including sponsorships and installing a defibrillator.

7

Quite the footprint! With clients ranging from Scotland to London, and even some as far away as Australia (though the majority are North-east based just like us).

9

Created our Customer Charter, assuring clients of our customer service promises.

10

Hosted many staff events and days out to build morale, and client events to strengthen relationships, that have seen us bowling, quizzing, golfing, karting, racing, baking... and just generally enjoying!

12

Acquired further small accountancy businesses alongside Gilchrist Tash (see *item 3*) to supplement our organic growth into the DT of today.

15

Held business events that have seen hundreds of our clients benefit from face-to-face and online presentations with early and understandable information on topics such as Making Tax Digital, Coronavirus Support, EU VAT, and the VAT Domestic Reverse Charge.

17

Found the fun in budgets, with budget bingo games available for clients to track our budget predictions!

19

Won a challenge from fellow Teesside business Archers Law. 'Racing home for Christmas' asked teams to race to 633,600 steps (300 miles). Our fantastic team hit the step count (well, actually exceeded it with a total of 733,076 steps) in just 4 days.

11

Legendary staff stories that keep us laughing... although maybe the ones that include people falling down stairs or phones falling down toilets shouldn't!

13

Played a part in the careers of over 80 people - with many employees being given their first job out of school / college / university with us.

14

Proudly watched 3 of our clients grow into multi-million pound businesses.

16

Produced free 'How to' guides having listened to the business concerns of our clients, on topics such as avoiding late payments, increasing prices, and even 'Do I really still need an accountant?'.

A Tax Investigation service to be proud of, called DT Protect, which has helped clients through HMRC enquiries at no cost to them, and also includes access to HR resources and advice.

18

20

Embraced software advances across the business, including offering clients a (now not needed) app with tax calculators, receipt income and mileage trackers, long before they were common in accounting software packages.