

CheckSmith^M

The financial OS for independent businesses

Invoicing • Bookkeeping • Self-Directed IRA — one branded workspace

Why Prospects Choose CheckSmith

Stop stitching together five tools. CheckSmith unifies invoicing, automated bookkeeping, and tax-advantaged retirement investing in a single branded dashboard — so founders always know where the business stands.

● Smart Invoicing

Send professional, brand-aligned invoices in seconds with automated follow-ups so you get paid faster.

● Auto-Bookkeeping

Categorize income and expenses automatically. Generate Profit & Loss reports on demand.

● Self-Directed IRA

Track alternative retirement assets — real estate, private equity, precious metals — beside your business books.

Up and Running in Minutes

- 1 **Create Your Free Account** — Pick a workspace name and sign up — no credit card required.
- 2 **Connect Your Accounts** — Securely link bank and business accounts for live cash-flow visibility.
- 3 **Brand Your Workspace** — Upload your logo and colors so every invoice looks like it came from you.
- 4 **Send Your First Invoice** — Or jump straight into bookkeeping and IRA tracking.

What's Included

- Bank-level encryption and role-based access controls
- Custom branding across invoices, portals, reports, and email
- Partnered custodian for self-directed IRA setup
- Email support on every plan; priority chat + dedicated onboarding on paid plans

Start Free at checksmith.com

No credit card required • Cancel anytime • Questions? hello@checksmith.com

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