

2010 Drake 101

This course is designed to introduce tax preparers to the basics of Drake Tax Software.

Upon completion of this course, participants will be able to:

- Navigate Drake Software
- Successfully complete required set up
- Identify other set up and printing options
- Repeat necessary steps to prepare a 1040 return
- Utilize Drake's View/Print Mode
- Describe how to electronically file a return in Drake Software

The units of this basic course include: required setup, data entry and navigation, letter and bill setup, view/print, and electronic filing.

For class participants at the Drake 101 course held in Franklin, NC, additional instruction will provide basic hands-on training in an instructor lead lab setting (an additional 2 hours of CPE will be awarded at no additional cost).

Upon completion of the lab, participants will be able to:

- Successfully complete Drake Software Practice Returns 1-3
- Demonstrate how to use navigation hot keys, screen codes, and shortcuts
- Utilize Drake's View/Print Mode to review and analyze returns

Prerequisites/Advanced Preparation: No prerequisites are necessary to participate in this live basic course and no advance preparation is needed. Students must complete Drake 101 instruction before participating in the lab portion of the course. The only advance preparation needed for the lab is to bring a laptop computer to class with the latest version of Drake Software installed.

Cost: The cost of the course is \$119. Register by 5:00PM EST, 30 days prior to the start of class to receive a 10% discount.

Policies: Refund requests must be sent in writing to the Drake Software Education Department via mail, fax, or e-mail. Refunds will not be granted by phone. Drake will make a full refund for any request received 10 business days before scheduled start of the training. Any cancellation received 5-9 business days prior to start will receive 50% refund. No refunds on cancellations less than 5 days before the scheduled start of the training. For more information regarding the refund policy, administrative policies, and complaint resolution, please contact our office at (828) 524-8020.

Course Level: Basic

Field of Study: Specialized Knowledge and Applications

Instructional Method: Group-Live/Contact

CPE Credits Available: 6 (8 when in Franklin, NC)

Last Revision: April 15, 2010

NASBA Course Provider #: 103137

California CTEC Course #: 3038-CE-0044 (6 Federal/0 State CPE Credits available. A student list is submitted the 15th of each month to www.ctec.org.) In accordance with the standards of the National Registry of CPE Sponsors and the California Tax Education Council, CPE credits are granted based on a 50-minute contact hour.

This course is approved by the Texas State Board of Public Accountancy for 6 credits, based on a 50-minute-hour.

Drake Software is an IRS qualified sponsor of continuing professional education for Enrolled Agents. Sponsor ID # 275.



Drake Software is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: www.nasba.org.



Drake Software has been approved by the California Tax Education Council to offer Drake 101, 3038-CE-0044, which provides 6 hours of federal credit and 0 hours of state credit toward the annual continuing education requirement imposed by the State of California. A listing of additional requirements to register as a tax preparer may be obtained by writing CTEC at P.O. Box 2890, Sacramento, CA, 95812-2890, calling toll-free by phone at (877) 850-2832, or by going on the Internet to www.ctec.org.

2010 Drake: Beyond the Basics

Earn six hours of CPE credit with Drake: Beyond the Basics. This course is designed to expand upon the basic skills that tax preparers learn in Drake 101.

Upon completion of this course, participants will be able to:

- Identify advanced setup features and utilize Drake's Specialty Screens
- Perform data entry for special circumstances such as a deceased taxpayer or clergy return
- Successfully complete Schedules C, F, E and SE for 1040 returns
- Locate and enter screens 4562, 4797, AUTO, SEP and SEHI
- Identify worksheets produced within the software and demonstrate how calculations flow
- List the imports and exports available in Drake Software

Prerequisites/ Advanced Preparation: Students must complete Drake 101 (live or Drake ETC video training) or have one or more years of working knowledge with Drake Tax Software before participating in this live intermediate course. No advanced preparation is required for this course.

Cost: The cost of the course is \$119. Register by 5:00PM EST, 30 days prior to the start of class to receive a 10% discount.

Policies: Refund requests must be sent in writing to the Drake Software Education Department via mail, fax, or e-mail. Refunds will not be granted by phone. Drake will make a full refund for any request received 10 business days before scheduled start of the training. Any cancellation received 5-9 business days prior to start will receive 50% refund. No refunds on cancellations less than 5 days before the scheduled start of the training. For more information regarding the refund policy, administrative policies, and complaint resolution, please contact our office at (828) 524-8020.

Course Level: Intermediate

Field of Study: Specialized Knowledge and Applications

Instructional Method: Group-Live/Contact

CPE Credits Available: 6

Last Revision: April 15, 2010

NASBA Course Provider #: 103137

California CTEC Course #: 3038-CE-0046 (6 Federal/0 State CPE Credits available. A student list is submitted the 15th of each month to www.ctec.org.) In accordance with the standards of the National Registry of CPE Sponsors and the California Tax Education Council, CPE credits are granted based on a 50-minute contact hour.

This course is approved by the Texas State Board of Public Accountancy for 6 credits, based on a 50-minute-hour.

Drake Software is an IRS qualified sponsor of continuing professional education for Enrolled Agents. Sponsor ID # 275.



Drake Software is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: www.nasba.org.

Drake Software has been approved by the California Tax Education Council to offer Drake: Beyond the Basics, course # 3038-CE-0046, which provides 6 hours of federal credit and 0 hours of state credit toward the annual continuing education requirement imposed by the State of California. A listing of additional requirements to register as a tax preparer may be obtained by writing CTEC at P.O. Box 2890, Sacramento, CA, 95812-2890, calling toll-free by phone at (877) 850-2832, or by going on the Internet to www.ctec.org.

2010 Drake Extras

This six-hour course introduces tax preparers to supplementary Drake Tax Software programs. Participants will learn how to utilize the Drake Document Manager, Drake Report Manager, Drake Tax Planner, Drake Scheduler, Drake Email, Archive Manager and Drake's Client Status Manager.

Upon completion of this course, participants will be able to:

- Describe how to use Drake's practice management tools to increase office efficiency
- Summarize how the Drake Document Manager can help you decrease paper flow
- Successfully create custom reports using the Drake Report Manager
- Identify how to forecast short and long-term income and tax situations with the Tax Planner
- Demonstrate how to track an office's workflow with Client Status Manager
- Compose and send e-mail messages using Drake Email
- Organize preparer schedules and appointments with Drake Scheduler
- Produce various return scenarios with the Archive Manager
- List all support resources available to Drake users

Prerequisites/ Advanced Preparation: No prerequisites are necessary to participate in this live basic course and the no advance preparation is needed prior to class.

Cost: The cost of the course is \$119. Register by 5:00PM EST, 30 days prior to the start of class to receive a 10% discount.

Policies: Refund requests must be sent in writing to the Drake Software Education Department via mail, fax, or e-mail. Refunds will not be granted by phone. Drake will make a full refund for any request received 10 business days before scheduled start of the training. Any cancellation received 5-9 business days prior to start will receive 50% refund. No refunds on cancellations less than 5 days before the scheduled start of the training. For more information regarding the refund policy, administrative policies, and complaint resolution, please contact our office at (828) 524-8020.

Course Level: Basic

Field of Study: Specialized Knowledge and Applications

Instructional Method: Group-Live/Contact

CPE Credits Available: 6

NASBA Course Provider #: 103137

Last Revision: April 15, 2010

California CTEC Course #: 3038-CE-0045 (6 Federal/0 State CPE Credits available. A student list is submitted the 15th of each month to www.ctec.org.) In accordance with the standards of the National Registry of CPE Sponsors and the California Tax Education Council, CPE credits are granted based on a 50-minute contact hour.

Approved by the Texas State Board of Public Accountancy for 6 credits. (Based on a 50-minute-hour.)

Drake Software is an IRS qualified sponsor of continuing professional education for Enrolled Agents. Sponsor ID # 275.



Drake Software is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: www.nasba.org.



Drake Software has been approved by the California Tax Education Council to offer Drake Extras, 3038-CE-0045, which provides 6 hours of federal credit and 0 hours of state credit toward the annual continuing education requirement imposed by the State of California. A listing of additional requirements to register as a tax preparer may be obtained by writing CTEC at P.O. Box 2890, Sacramento, CA, 95812-2890, calling toll-free by phone at (877) 850-2832, or by going on the Internet to www.ctec.org.

2010 Client Write-Up

This three day (twenty-hour) course is designed to introduce tax preparers to Client Write-Up, Drake Software's accounting, payroll, and accounts payable program. Upon completion of this course, participants will be able to:

- Complete setup for accountant, new client, payroll and Chart of Accounts
- Employ Live and After-the-Fact payroll processing for employees and contractors
- Demonstrate accounts payable and producing vendor and non-vendor checks "on-the-fly"
- Complete reconciliation, general bookkeeping, reports, QuickBooks® and Peachtree® imports
- Produce and electronically file W-2s, 1099s, and 941 tax returns
- Demonstrate basic Client Write-Up knowledge by completing a practical application workbook

Prerequisites/ Advanced Preparation: The prerequisite for this course is a working knowledge of basic accounting and accounting practices and the only advance preparation needed is to **bring a laptop computer to class with the latest version of Client Write-Up 2010 installed.**

Cost: The cost of the course is \$399. Register by 5:00PM EST, 30 days prior to the start of class to receive a 10% discount.

Policies: Refund requests must be sent in writing to the Drake Software Education Department via mail, fax, or e-mail. Refunds will not be granted by phone. Drake will make a full refund for any request received 10 business days before scheduled start of the training. Any cancellation received 5-9 business days prior to start will receive 50% refund. No refunds on cancellations less than 5 days before the scheduled start of the training. For more information regarding the refund policy, administrative policies, and complaint resolution, please contact our office at (828) 524-8020.

Course Level: Basic

Field of Study: Accounting

Instructional Method: Group-Live/Contact

CPE Credits Available: 20

Last Revision: April 15, 2010

NASBA Course Provider #: 103137

California CTEC Course #: 3038-CE-0047 (20 Federal/0 State CPE Credits available. A student list is submitted the 15th of each month to www.ctec.org.) In accordance with the standards of the National Registry of CPE Sponsors and the California Tax Education Council, CPE credits are granted based on a 50-minute contact hour.

This course is approved by the Texas State Board of Public Accountancy for 20 credits, based on a 50-minute-hour.

Drake Software is an IRS qualified sponsor of continuing professional education for Enrolled Agents. Sponsor ID # 275.



Drake Software is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: www.nasba.org.



Drake Software has been approved by the California Tax Education Council to offer Client Write-Up, 3038-CE-0047, which provides 20 hours of federal credit and 0 hours of state credit toward the annual continuing education requirement imposed by the State of California. A listing of additional requirements to register as a tax preparer may be obtained by writing CTEC at P.O. Box 2890, Sacramento, CA, 95812-2890, calling toll-free by phone at (877) 850-2832, or by going on the Internet to www.ctec.org.