



FORM 1040 *INDIVIDUAL TAX RETURNS*

QUICK FACTS

- Access State Data Entry from Federal Data Entry
- Federal Information Flows to State Returns
- Auto-fill Available for Amended Returns
- Group Sales of Depreciable Assets
- Many Credit Forms Available
- More than 175 Forms, Schedules, and Worksheets Included
- 1040NR Returns
- Split MFJ Returns into MFS Returns
- Standard and Custom Reporting Options
- Data Entry Organized by Different Areas of the Return (Income, Adjustments, Credits, etc.)
- Update of Client Data from Year to Year
- Import K-1's from 1120S, 1065, and 1041 Packages
- Diagnostic Notes and Message Pages
- Sorting of Interest and Dividend Entries
- Print Preparer and ERO Signatures
- Print Estimate/Extensions, Federal, State, Preparer, and Client Sets
- Print to PDF
- Print Labels
- Drake Document Manager for Paperless Offices
- Client Status Manager for Client Return Tracking
- Tax Planner for Forecasting Client Scenarios
- Setup Options for All Returns
- Import Data from QuickBooks®
- Appointment Scheduler
- Proformas and Organizers
- Multi-office Manager

- Prior Year Comparisons
- Software Updates Delivered Online
- Email Alerts
- Ability to Email Returns to Support

COMPREHENSIVE CALCULATIONS

- Alternative Minimum Tax
- AMT Depreciation
- Estimated Tax
- Amended Returns
- At-risk Limitations
- Sales Tax vs. State Income Tax
- Like-kind Exchanges
- Lump Sum Distribution
- Child Tax Credit
- Passive Activities
- SEP/Keogh/SIMPLE Contributions
- Ministerial Income Calculations
- 4797 Calculations
- Foreign Income Exclusion
- Underpayment Penalty
- Household Employment Taxes
- Kiddie Tax
- Business Use of Home
- Self-employment Tax
- Charitable Contribution Limitation
- Partial Rental Ownership
- Vacation Homes
- Federal and State Depreciation Differences
- Unlimited Number of Fixed Assets Installment Sales

For a Free Demo of Drake, Please Call Our Sales Department

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- Publicly Traded Partnerships
- Carryover items
- NOL's
- Suspended Losses
- Tax Preference Items
- Sale of Home
- Section 179 business income limitation

ELECTRONIC FILING FEATURES

- Electronic Filing Available for Federal as well as All States
- Numerous Reports Available on Electronically Filed Returns

FORMS AND SCHEDULES

- 56 Notice Concerning Fiduciary Relationship
- 709 Gift Tax Return
- 970 Application to Use LIFO Inventory Method
- 982 Reduction of Tax Attributes
- 1040 Individual Income Tax Return
- 1040A Individual Income Tax Return
- 1040ES Estimated Income Tax for Individuals
- 1040EZ Individual Income Tax for Single and Joint-filers with No Dependents
- 1040NR Individual Income Tax for Nonresident Aliens
- 1040V Payment Voucher
- 1040X Amended Individual Tax Return
- 1045 Application for Tentative Refund
- 1098 Mortgage Interest Statement
- 1099-LST Detail Listing
- 1099G Certain Government Payments
- 1099-MISC Miscellaneous Income

- 1099R Distributions from Pensions, Annuities, Retirement, Etc.
- 1099-RRB Railroad Retirement Benefits
- 1099-SSA Social Security Benefits
- 1116 Foreign Tax Credit
- 1116AMT Foreign Tax Credit Alternative Minimum Tax
- 1310 Statement of Person Claiming Refund due a Deceased Taxpayer
- 2106 Employee Business Expenses
- 2106EZ Unreimbursed Employee Expenses
- 2120 Multiple Support Declaration
- 2210 Underpayment of Estimated Tax
- 2210F Underpayment of Estimated Tax by Farmers and Fishermen
- 2350 Application for Extension of Time
- 2439 Notice of Long-term Capital Gains
- 2441 Child and Dependent Care Expenses
- 2555 Foreign Earned Income
- 2555EZ Foreign Earned Income Exclusion
- 2848 Power of Attorney
- 3468 Investment Credit
- 3800 General Business Credit
- 3903 Moving Expenses
- 4136 Credit for Federal Tax Paid on Fuels
- 4137 Social Security and Medicare Tax on Unreported Tip Income
- 4255 Recapture of Investment Credit
- 4506-T Request for Transcript of Tax Return
- 4562 Depreciation and Amortization
- 4684 Casualties and Thefts

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4797	Sales of Business Property	8594	Asset Acquisition Statement
4835	Farm Rental Income and Expenses	8606	Nondeductible IRAs
4852	Substitute Form W-2	8609	Low-income Housing Certification
4868	Application for Automatic Extension to File Form 1040	8609_A	Annual Statement
4952	Investment Interest Expense Deduction	8611	Recapture of Low Income Housing Credit
4952AMT	Investment Interest Expense Deduction – Alternative Minimum Tax	8615	Tax for Children under Age 18 with Investment Income
4970	Tax on Accumulation of Distribution of Trust	8801	Credit for Prior Year Minimum Tax
4972	Tax on Lump-sum Distributions	8812	Additional Child Tax Credit
5329	Additional Taxes on Qualified Plans	8814	Parents' Election to Report Child's Interest and Dividends
5884	Work Opportunity Credit	8815	Exclusion of Interest from Series EE and I US Savings Bonds
6198	At-risk Limitations		
6251	Alternative Minimum Tax - Individuals	8820	Orphan Drug Credit
6252	Installment Sale Income	8821	Tax Information Authorization
6478	Credit for Alcohol Used as Fuel	8822	Change of Address
6765	Credit for Increasing Research Activities	8824	Like-kind Exchanges
6781	Gains and Losses from Section 1256 Contracts and Straddles	8826	Disabled Access Credit
8082	Notice of Inconsistent Treatment	8828	Recapture of Federal Mortgage Subsidy
8275	Disclosure Statement	8829	Expenses for Business Use of Your Home
8275R	Regulation Disclosure Statement	8830	Enhanced Oil Recovery Credit
8283	Non-cash Charitable Contributions	8834	Qualified Electric Vehicle Credit
8283D	Donee Information	8835	Renewable Electricity and Refined Production Credit
8332	Release of Claim to Exemption for Child of Divorced or Separated Parents	8839	Qualified Adoption Expenses
8379	Injured Spouse Claim	8844	Empowerment Zone Credit
8396	Mortgage Interest Credit	8845	Indian Employment Credit
8582	Passive Activity Loss Limitations	8846	Credit for Employers Social Security and Medicare Taxes Paid
8582_CR	Passive Activity Credit Limitations	8847	Credit for Contributions to Selected Community Development
8586	Low-income Housing Credit		

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8853	Archer MSAs and Long-term Care Insurance Contracts	8911	Alternative Fuel Vehicle Refueling Property Credit
8857	Request for Innocent Spouse Relief	8912	Clean Renewable Energy Bond Credit and Gulf Bond Credit
8859	District of Columbia First-time Homebuyer Credit	8915	Qualified Hurricane Retirement Plan Distributions
8860	Qualified Zone Academy Bond Credit	8917	Tuition and Fees Deduction
8861	Welfare-to-Work Credit	8919	Uncollected Social Security and Medicare Tax on Wages
8862	Information to Claim Earned Income Credit after Disallowance	9325	Acknowledgement and General Information for Taxpayers who File Electronically
8863	Education Credits	9465	Installment Agreement Request
8864	Biodiesel Fuel Credit	90221	Report of Foreign Bank and Financial Accounts
8866	Interest Computation under the Look-back Method	DIV_LST	Dividend Listing
8867	Paid Preparer's EIC Checklist	FEC	Foreign Employer Compensation
8873	Extraterritorial Income Exclusion	W-2	Wage and Tax Statement
8874	New Markets Credit	W-2_LST	W2 Listing
8878	Signature Authorization Application for Extension of Time to File	W-2G	Certain Gambling Winnings
8879	IRS E-file Signature Authorization	W-4	Withholding of Federal Income Tax
8880	Credit for Qualified Retirement Savings Contributions	W-7	Application for IRS Individual Taxpayer Identification Number
8881	Credit for Small Employer Pension Plan Startup Costs	SCH1	Schedule 1, Interest and Ordinary Dividends
8882	Credit for Employer-provided Child Care and Services	SCH2	Schedule 2, Child and Dependent Care Expenses
8885	Health Coverage Tax Credit	SCH3	Schedule 3, Credit for the Elderly or the Disabled
8889	Health Savings Accounts (HSAs)	SCHA	Schedule A, Itemized Deductions
8896	Low Sulfur Diesel Fuel Production Credit	SCHB	Schedule B, Interest and Ordinary Dividend Income
8901	Information on Qualifying Children Who Are Not Dependents	SCHC	Schedule C, Profit or Loss from Business
8903	Domestic Production Activities Deduction	SCHC-EZ	Schedule C-EZ, Net Profit from Business
8907	Nonconventional Source fuel Credit	SCHD	Schedule D, Capital Gains and Losses
8908	Energy Efficient Home Credit	SCHD-1	Schedule D, Continuation Sheet
8910	Alternative Motor Vehicle Credit	SCHE	Schedule E, Supplemental Income and Loss
		SCHEIC	Schedule EIC, Earned Income Credit

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SCHF Schedule F, Farm Income
SCHH Schedule H, Household Employment Taxes
SCHJ Schedule J, Income Averaging for Farmers and Fishermen
SCHR Schedule R, Credit for the Elderly or the Disabled
SCHSE Schedule SE, Self-employed Tax

WORKSHEETS

8582-PTP Worksheets for Publicly Held Partnerships

AMT-NOL Alternative Net Operating Loss
Clergy Clergy Worksheet
MFS-ALLC Community Property State Married filing Separate Allocation Worksheet
SALESTAX State and Local General Sales Tax Deduction Worksheet
WK-MSA MSA Contribution Limits
WK-PEN 2210 Underpayment Penalty
WK-SCH E Schedule E Worksheet, Rental Limitation on Deductions for Personal Use
WK-SCH J Schedule J Worksheet
WK-SEHID Self-employed Health Insurance Deduction
WK-1045 Itemized Deductions Limitations
WK-1116 Lump-sum Distributions
WK-1116D Worldwide Qualified Dividends and Capital Gains
WK_I179L Business Income Limitation for Section 179
WK-1250 Unrecaptured Gain Worksheet
WK-2119 Worksheet for Sale of Home
WK-2289 Deduction for Business Use of Home
WK-4952 Investment Interest Expense Deduction for AMT
WK-6251A Exemption Worksheet
WK-8582 Passive Activity Worksheets
WK-8582CR Form 8582-Credit Worksheets

WK-8606 Worksheet for Reduced IRA Deduction
WK-8606N 1040 IRA Deduction Worksheet
WK-8611 Form 8611 Worksheet
WK-8615 Form 8615 Worksheet
WK-8812 Child Tax Credit
WK-8814 Child's Qualified Dividends and Capital Gain Distributions
WK-8829 Deduction for business Use of Home
WK-8839 Modified AGI Worksheet - Form 8839
WK_88393 Exclusion of Prior Year Benefits- Form 8839
WK_88394 Credit Carry Forward- Form 8839, line 18
WK_8917 MAGI For the Tuition and Fees Deduction
WK-A Schedule A Worksheet, Itemized Deductions
WK-A-NR Itemized Deductions Worksheet
WK-AUTO Auto Expense Worksheet
WK-CAPGN Capital Gains Tax Worksheet - Form 2210 A1, Line 12
WK-CARRY Carryover Worksheet
WK-CCLMT Applying the Deduction Limits for Charitable Contributions
WK-CG02 Capital Gain Worksheets
WK-CTC4 Taxable Earned Income Worksheet
WK-D Schedule D, Tax Worksheet
WK-D-CG Capital Loss Carryover Worksheet
WK-D-J Schedule D Tax Worksheet for Schedule J
WK-EIC Earned Income Credit Worksheet
WK-ES Estimated Tax Worksheet for Next Year
WK-EX SS Excess Social Security Tax Withheld
WK-EXMPT Deductions for Exemptions
WK-MSA MSA Contribution Limits
WK-NOL NOL Carryback / Carryover Worksheet
WK_PMI Private mortgage insurance deduction
WK-REF State and Local Income Tax Refund Worksheet

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- WK-ROTH Maximum Roth IRA Contribution
- WK-SEHID Self-employed Health Insurance Deduction Worksheet
- WK-SEP Self-employed Rate and Deduction
- WK-SGR Simplified Method
- WK-SLID Student Loan Interest Deduction
- WK-SSB Social Security Benefits
- WK-STDED Dependents Standard Deduction
- 8655 Reporting Agent Authorization for Magnetic Tape/Electronic Filers
- 8689 Allocation of Individual Income Tax to the Virgin Islands
- 8709 Exception from Withholding on Investment Income of Foreign Governments
- 8802 Application for US Residency Certification
- 8819 Dollar Election under Section 985
- 8832 Entity Classification Election
- 8836 Qualifying Children Residency Statement
- 8843 Statement for Exempt Individuals and Individuals with a Medical Condition

OTHER FORMS AVAILABLE

- 843 Claim for Refund
- 1040NREZ 1040 - Nonresident Aliens with No Dependents Tax Return
- 1040SS Self-Employment Tax Return
- 1096 Annual Summary and Transmittal of US Information Returns
- 1127 Application for Extension of Time for Payment of Tax
- 433A Collection Information Statement for Wage Earners and Self-employed Individuals
- 433B Collection Information Statement for Businesses
- 4571 Explanation for Filing Return Late or Paying Tax Late
- 5213 Election to Postpone Determination – Activity for Profit
- 8300 Report of Cash Payments over \$10,000
- 8633 Application to Participate in the IRS E-file Program
- 8854 Initial and Annual Expatriation Information Statement
- 8886 Reportable Transaction Disclosure Statement
- 8911 Alternative Fuel Vehicle Refueling Property Credit
- 12507 Innocent Spouse Statement
- 12509 Statement of Disagreement
- SCH T Forest Activities Schedule
- W-2C Wage and Tax Statement Correction
- W-2GU Guam Wage and Tax Statement
- W-3 Transmittal of Wage and Tax Statement
- W-7A Application for Taxpayer Identification for Pending US Adoptions
- W-7P Application for Preparer Identification Number
- 8866 Interest Computation Under the Look-back Method
- 8883 Asset Allocation Statement Under Section 338

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