



The Professional Tax Solution © 2010

# ALWAYS EXCEPTIONAL

*CPA Technology Advisor*

## **2011 READERS' CHOICE AWARDS**

- #1 Document Management & Document Storage
- #1 Federal/State Income Tax Compliance
- #1 Website Builders for Accounting Firms
- #1 Workflow — Other Tools

*Journal of Accountancy*

## **2010 TAX SOFTWARE SURVEY**

- #1 Overall Rating
- #1 Ease of Installation/Update
- #1 Network Capability

*National Association of Tax Professionals (NATP)*

## **2010 SORTING OUT SOFTWARE SURVEY**

- #1 in Overall Customer Satisfaction

*CPA Magazine*

## **2010 TOP 8**

- 1040 Tax Software Solutions

*CPA Technology Advisor*

## **2010 REVIEW OF PROFESSIONAL TAX SYSTEMS (TRADITIONAL WORKFLOW)**

- Overall Rating: ★★★★★½
- Core Functionality: ★★★★★½
- Integration: ★★★★★½
- Help/Support: ★★★★★¾



# Free Conversions

Simplifying Your Transition

Converting and importing data into Drake Software is quick and easy, and we're committed to giving you a smooth transition to Drake. You'll receive your conversion program early so you have plenty of time to get ready before tax season. See the list below for the conversion programs we currently offer. Please call us or visit us online at [DrakeSoftware.com](http://DrakeSoftware.com) if you do not see your software listed.

- > Crosslink® by Petz Enterprises (1040)
- > Lacerte® by Intuit® (1040, 1120, 1120S, 1065)
- > ProSeries® by Intuit® (1040, 1120, 1120S, 1065)
- > ProSystem FX® by CCH (1040, 1120, 1120S, 1065)
- > Saber/Max® by ATX (1040, 1120, 1120S, 1065)
- > TaxSlayer Pro® (1040)
- > TaxWise® by Universal Tax Systems (1040, 1120, 1120S, 1065)
- > TaxWorks® by Laser Systems (1040, 1120, 1120S, 1065)  
Also sold as GreatTax™, Tax Agent, and Tax Vision
- > UltraTax® by Creative Solutions (1040, 1120, 1120S, 1065)
- > TaxAct® by 2nd Story Software, Inc. (1040)
- > Turbo Tax® by Intuit® (1040; files must be sent to Drake for conversion)

A Smooth  
>>> Transition

Drake Software is proud to be a qualified sponsor of continuing education with the NASBA's National Registry of CPE Sponsors, the California Tax Education Council (CTEC), the Oregon State Board of Tax Practitioners (OBTP), the Texas State Board of Public Accountancy (TSBPA), and the Internal Revenue Service.

[DrakeSoftware.com/Training/CPEcredits.aspx](http://DrakeSoftware.com/Training/CPEcredits.aspx)

# Training

Tackle Tax Season with Confidence

**Evaluation Guide** > This guide introduces you to navigation, setup, and e-filing. It walks you through preparing 1040, 1120, and 1065 returns within the software. You also earn FREE CPE credits just for completing the evaluation guide.

**e-Training Center (ETC)** > Use ETC as a resource to train your entire office! ETC offers interactive tax courses on a variety of topics from basic 1040 preparation to corporations and partnerships – all with the option of earning CPE credit. Use practice returns to familiarize yourself with Drake data entry, and view tutorials that teach the basics of the software. Both student and administrator can view the student's progress using our handy report-card feature. Visit [DrakeETC.com](http://DrakeETC.com) for more information.

**Drake Passport to Success** > Our Passport to Success will help you get ready for a great tax season with Drake Software. Follow our itinerary of important tax and software topics to explore before tax season, and we'll keep track of your progress by stamping your Passport along the way. At the end of your journey, you will receive a special certificate. Passport to Success is available at [Support.DrakeSoftware.com](http://Support.DrakeSoftware.com).

**Interactive Tutorials** > Tutorials introduce the basics of the software, including setup, navigation, and e-filing.

**Live Training** > New customers can look forward to a wide array of live training options, from online webinars to traditional classroom instruction. We offer courses across the United States and in Franklin, NC – the home of Drake Software. For dates and locations, visit the Training menu at [DrakeSoftware.com](http://DrakeSoftware.com).

**Update Schools** > Each fall, Drake Software hosts Update Schools at various locations across the United States. These schools review the latest tax law changes, present new software enhancements, and provide the opportunity to earn CPE credit while networking with other users. For dates and locations, see the Training menu at [DrakeSoftware.com](http://DrakeSoftware.com).

**Drake Software User's Manual** > *The Drake Software User's Manual* is a comprehensive resource for all your software questions. You can access the manual as a PDF file on your Drake CD, from within Drake Software, or online at [Support.DrakeSoftware.com](http://Support.DrakeSoftware.com). In addition, a paper *Drake Software User's Manual* is also available for purchase.

**Drake Help System** > Access the Drake help system from within the tax software. This resource includes screen-specific information and steps for completing procedures in the program. The help system is user-friendly, with three different ways to access data: by topic, by index, or by keyword search. From within data entry, you can access field-specific help, screen help, and FAQs for all federal and state packages.

**1040.com**

**Taxes, smart and simple**  
Fast, easy, affordable online tax returns.  
Smart because it's simple, simple because it's smart.

- Easy interview gives you just the forms you need.
- No credit card needed! Pay with your federal refund.
- Free preview of your federal return, pay only when you file.
- Refunds as soon as 8 days with e-filing and direct deposit.

**Start Now**

**Returning Users**

- When will I get my federal refund?
- Check your federal refund status
- Check your state refund status

**Want to try it first?**  
That's ok — we welcome test drives! Just click below to get alerted, and see how simple and smart it is to do your taxes with 1040.com.

**Start free trial**

**Simple — FREE!**

- Single or married, under 65
- Without kids or dependents
- Standard deduction
- Taxable income < \$100,000

Complete, print and e-file your federal return for FREE

[Learn More](#) | [State Additional](#)

**Basic — \$19.95**

- Standard deduction
- Taxable income < \$100,000
- Retirement income
- More tax credits

Complete, print and e-file your federal return for \$19.95

[Learn More](#) | [State Additional](#)

**Deluxe — \$39.95**

- All personal & business income
- Itemized deductions
- Any taxable income amount
- All tax credits

Complete, print and e-file your federal return for \$39.95

[Learn More](#) | [State Additional](#)

**What's new this year?**

- Easier interview helps you skip sections that don't apply to you
- "Smart" forms hide and show sections as needed — a real timesaver for you!
- Built-in error checking catches mistakes before you file

**What hasn't changed?**

- You'll always automatically get the lowest cost option possible
- You never pay extra for e-filing or printing your returns
- Free unlimited support

Federal Forms | Available States

**TRUSTe** VERIFIED **e-file**

**No need to decide which package you need!**  
With 1040.com you don't have to choose between different packages. Just step through the easy interview and fill out the needed forms and you'll always get the lowest cost option possible for you. Guaranteed.

## Preparer Websites at 1040.com

Ready to expand your business and reach an entirely new market? Make your business grow by allowing customers to complete and file their own tax returns through your **1040.com** website. Your customizable site is easy to create, maintain, and monitor, and is a potential profit center for your business.

Through your site, customers can prepare their tax returns from the comfort of their homes using our safe, reliable, and accurate system. Drake redesigned preparer websites for 2010, and it's easy to see why they were voted #1 by readers of *CPA Technology Advisor* magazine.

## Online Payment Options

Drake offers two convenient options for paying a balance online. With Integrated File and Pay, the balance is paid automatically via direct debit once the e-filed return is accepted. With **1040paytax.com**, your client can go online and pay the the balance due after you've e-filed the return.

## Free Marketing Tools

Drake Software customers have free access to marketing materials at **Support.DrakeSoftware.com**. Our custom marketing kits include professional posters, newspaper ads, postcards, buttons, banners, and more. While some of the printed materials are available at cost, you can download all artwork free as PDF files.

"Drake Software has helped us grow our business because it allows us to prepare taxes interactively, not piecemeal like some of the other 'out of the box' software."

Philip > Valued Customer Since 1996



**Drake 2010 View/Print Client Return | Michael, Samuelson & E (400001904)**

Menu: Data Entry, Print, Setup, Archive, Email, Refresh, Basic View, 8615 Export, Help, Exit

Select Forms to View/Print: All Forms, Sets, EF, Federal, Worksheets, Miscellaneous, Notes/Messages, North Carolina

**Form 1040 U.S. Individual Income Tax Return 2010**

Name, Address, and SSN: Samuelson, Michael (400-00-1904); Elizabeth, Michael (400-00-1905); Franklin, NC 28734

Filing Status:  Married filing jointly (even if only one had income)

Exemptions: 3 (Total number of exemptions claimed)

## Productivity

**Flexible Data Entry** > You're in control! Choose from our standard data entry method or a forms-based method. You can also define field selections, lock fields, or even establish which screens will be accessible from the Data Entry Menu.

**Simple Navigation** > Navigating through the return process is fast and simple. Any time during data entry, click once to view generated forms or open a summary of the return. From the Summary screen, another click selects the return for e-filing.

**Organized Results** > With Enhanced View Mode, you can easily select forms for printing, access form pricing, and change the order in which forms are printed. Enjoy the ability to view a tax return's generated forms and worksheets in a tree view, or narrow your view by form category.

**Always Current** > Keeping your software up to date is easy. With the Update Manager's automatic updates, you never miss a program update.

## Features to Save You Valuable Time

**2D Barcode Scanning** > Does a W-2 or K-1 have a 2D barcode? You can scan it directly into the software — a quick and simple process that ensures data accuracy. (A 2D barcode scanner is required)

**Shortcut Keys & Macros** > Simplify data entry with preprogrammed shortcuts or custom macros that reduce repetitive keystrokes.

**Autofill Features** > The Employer Identification Number (EIN) and ZIP code databases allow you to save time by entering EIN and address information only once. The EIN database automatically fills employer fields on future returns after your initial entry of EIN information, while the ZIP code database completes the city and state fields for you once you've entered your client's ZIP code.

**Quick Estimator** > Estimate your client's refund with minimal data entry and a few simple clicks.

"We are really excited to be with Drake - they serve all of our purposes. They helped expand my business to five locations, and we're going to grow again next year."

**James > Valued Customer Since 1995**

## Import & Export Features

Drake makes it easy to transfer data from one return to another.

**8615 Export** > Save time and simplify data entry by using a quick, two-step process to export parents' tax information to a child's Form 8615.

**K-1 Export** > K-1 data from 1041, 1120S, and 1065 returns easily flows into 1040 tax returns.

Item	TSJ	F	State	City	Description	Acquired	Sold	Sales Price	Cost	S/L	A
1	T	F	NC		Stock 1	02/17/1992	11/29/2009	\$3,792.00	\$2,385.00		
2	T		NC		Stock 2	06/01/1993	12/01/2009	\$1,566.00	\$541.00		
3	T		GA		Mutual Fund 1	12/14/1987	10/28/2009	\$5,661.00	\$3,250.00		
4	T		SC		Mutual Fund 2	05/16/2003	04/15/2009	\$3,847.00	\$2,478.00		
5	T		SC		Mutual Fund 3	02/07/2004	03/06/2009	\$659.00	\$325.00		
6	T		TN		Mutual Fund 4	09/05/2006	05/14/2009	\$1,568.00	\$987.00		
7	S		FL		Stock 3	08/02/2001	07/25/2009	\$1,204.00	\$748.00		
8	S		FL		Stock 4	05/19/1994	03/26/2009	\$3,578.00	\$3,210.00		
9	S		NC		Stock 5	06/12/2005	10/14/2009	\$981.00	\$497.00		
10	S		TN		Stock 6	11/07/2007	12/01/2009	\$2,678.00	\$1,852.00		
11	S		TN		Stock 7	06/13/1998	06/15/2009	\$8,910.00	\$5,433.00		
12	S		TN		Stock 8	04/15/2000	01/14/2009	\$12,547.00	\$9,430.00		
13											

**W-2 Import** > Download W-2 information directly into Drake data entry.

**Schedule D Import** > With this clean and simple feature, take all of your Schedule D transactions from Excel® and, with the click of a button, import unlimited entries into Drake.

**Trial Balance Import** > Simply enter data from your balanced books into your trial balance spreadsheet and import the information directly into an 1120, 1120S, or 1065 return.

## Forms & Schedules

With over 6,000 federal and state forms and schedules, Drake Software includes:

- > 1040
- > 1040NR
- > 1041
- > 1065
- > 1120
- > 1120-H
- > 4720
- > 5471
- > 1118
- > 3115
- > 1120S
- > 706
- > 709
- > 990
- > 990-PF
- > All states

## Support

Providing the Best Support ... Hands Down!

With Drake, you can expect personal and prompt service – no matter what time of year. On average, our customers wait less than nine seconds during peak season to speak with a customer support representative. You can depend on our staff of dedicated support personnel, who have direct access to software programmers, to promptly give you the answers you need. Spanish support is also available.

## Knowledge Base

Access the most current support and product information 24/7. Drake constantly updates and enhances the Knowledge Base so you can troubleshoot or find answers to specific questions. You can even customize your search based on a keyword, category, subcategory, and year. Drake customers access the Knowledge Base by clicking the “Support” shortcut key in the software or by logging on to **Support.DrakeSoftware.com**.

## Broadcast E-mail

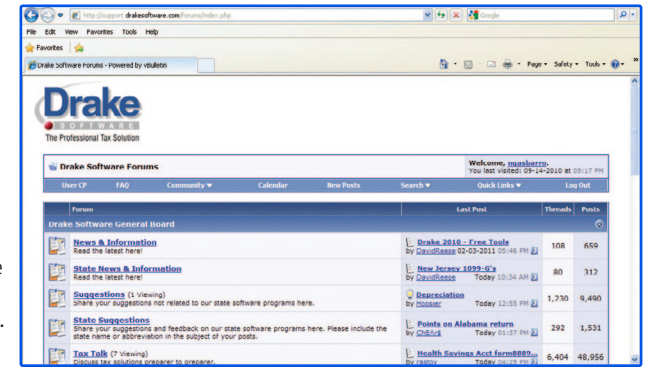
Broadcast e-mails, sent to your Drake-provided e-mail account, notify you of important information about that latest industry news and Drake-related updates.

## Online Tax Research

Online tax research is also included when you purchase Drake Software. The resource includes quick references and tools to get the answers you need, when you need them.

## Drake Software Forums

Online forums, moderated by Drake representatives, provide opportunities for Drake customers to post messages about everything from business strategies and software questions to the latest tax news and software suggestions.



## Return Diagnostics

Drake 2010 - Calculation Results - (400-00-1904 - Michael, Samuelson B. Elizabeth)

	Total Income	Taxable Income	Total Tax	Refund	Balance Due	Payment Method	Eligible For EF
Federal	77,795	95,445	7,476	1,724	0	Receive Check	Yes
NCD400	77,795	64,295	3,287	0	877	Check or CC	No

EF Messages - Double click on any highlighted item in the list below to fix the problem:

Package	Code	Description - (right-click for full description)
NC	11	Paid Preparer and no preparer phone number entered...
NC	16	The amount of NC credits taken on the return must match what...

Return Notes:  
NC Electronic Filing NOT allowed - See Message Page

Fee Type	Amount
Preparation Fee	\$83.00

DCN: 00-777777-01904-1  
Total Tax Refund: 847

Current Program: Calculation Complete **Eligible For E.F.**  
Description: Press <ENTER> key or Click Here to Continue

EF Messages are produced when a return has an issue that would cause an IRS rejection. Each message, which consists of the error code and a brief description of the issue, must be cleared before a return can be e-filed.

Notes are generated automatically to provide reminders and tips about each tax return.

## Archive Manager

Use the Archive Manager to save a return before amending it, or to compare multiple versions of a return so you can make the best recommendation to your client.

## Tax Year Comparison

Quickly compare and analyze a client's data from multiple tax years with our convenient comparison worksheet.

## Interactive Diagnostics

The Calculation Results window displays return information—including notes, fees, refund amount, and e-file eligibility—at a glance. If a return is not eligible for e-file, a simple click can take you directly to the problem form and field.

As the leader in electronic filing for over 20 years, Drake Software knows how important speed and reliability are to you. We have both the experience and the expertise to ensure that your files are secure — we've been part of e-filing since its inception in 1986, and our processing center is the most reliable in the industry.

Drake provides everything you need to e-file federal and state individual, business, fiduciary, nonprofit organization, and estate returns. Our secure servers process your e-filed returns and route them to the proper IRS service centers and the appropriate states.

## PDF Attachments

In Drake, it's easy to attach PDF files to your business returns for e-filing. Once you're done, the documents can be stored in the Drake Document Manager for future reference. PDFs can be e-filed with forms 1120, 1120S, 1065, and 990.

*Last Year Drake Software Seamlessly Processed Over  
15 Million Federal & State Accepted Returns.*

*"We've been e-filing ever since e-filing started, and it's very easy to do with Drake. You just click one button and it's gone!"  
Jack > Valued Customer Since 1999*

## Software Customization

**Setup Options** > Tailor the software to suit your office needs. From what forms are generated with a tax return, to the electronic filing process, the software offers a large amount of flexibility. Many of the global options can be overridden on a per-return basis in data entry.

**Preparer Security** > Assigning security settings to preparers in your office is easy. Choose from pre-defined security settings or customize the level of access a preparer receives. Assign security individually or to an entire group. The process is flexible and convenient, and it gives you control over your software and those who use it.

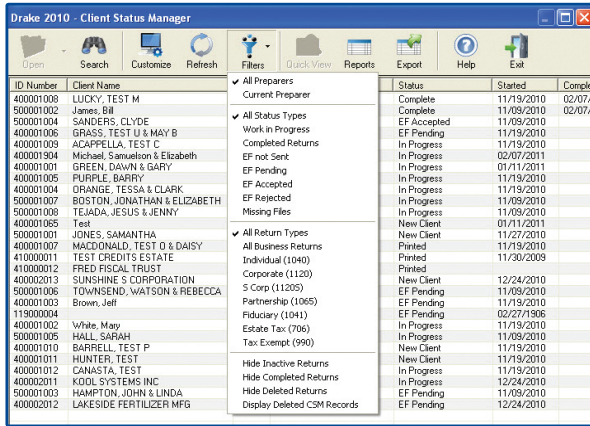
## Client Status Manager (CSM)

- > Easily search, view, and organize client files
- > Follow workflow and manage productivity with on-screen tracking and reporting
- > Track return details, from preparer efficiency to billing revenue, and even real-time accounts receivable
- > Narrow down your view using filters

**Interactive Home Window** > The **Home** window features a condensed version of the CSM. The Personal Client Manager (PCM) displays returns for the logged-in preparer, helping to organize and prioritize the day.

The **Notes** portion of the **Home** window acts as your electronic notepad. The

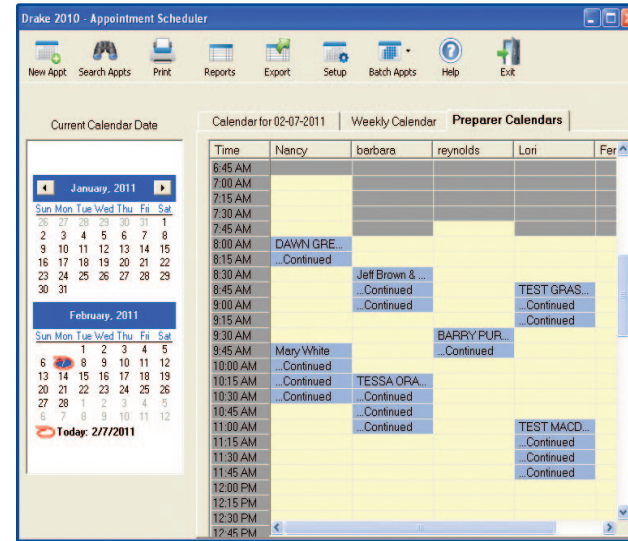
**Appointments** portion displays your daily appointment schedule, while the **Notifications** section apprises you of e-mails to download or updates available. The **Home** window also allows you to hide all client-related data with the click of a button.



## Customized Letters

Keep in touch with your clients easily with over 40 prewritten letters that you can edit to suit your clients' needs. The Client Communications Editor allows you to fully customize or write a letter using keywords and conditional paragraphs, font choices, letterhead options, and other features to enhance and personalize your client communications.

## Appointment Scheduler

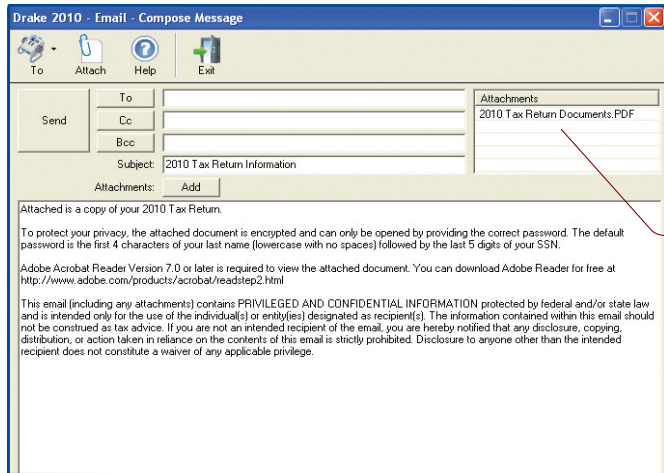


Create and manage preparer schedules and appointments in the Scheduler. The Scheduler can be launched in either Preparer Mode or Front Office Mode (designed for office personnel who create and manage appointments but don't need access to the full Drake program).

## Proformas & Organizers

Proformas and organizers are valuable pre-season tools that help save time during the rush of tax season. Organizers, which can be e-mailed securely as PDF files, help your clients collect their records and prepare for their appointments. Use proformas to guide you through client interviews and speed data entry. Both proformas and organizers include the previous year's tax information.





## PDF Printer

With the Drake PDF printer, you can password-protect PDF copies of tax returns. From data entry, you can print an electronic copy of any return to the Drake Document Manager.

You can even e-mail a client directly from inside a tax return, and, with one click, attach an encrypted PDF copy of the return to the e-mail.

## Reporting

**Client, EF, and Scheduler Reports** > Operate your practice more efficiently with reports. With Drake's Report Manager, you can view and print reports on data entry statistics, return statuses, e-filing information preparer appointments, and much more.

**Real-Time Web Reports** > Use the online electronic filing (EF) database to track e-filed returns quickly and easily from anywhere with an Internet connection. See which returns have been accepted or rejected by the IRS and state, and monitor the status of bank products. You can even check the status of your preparer fees online. If you have multiple offices, view a snapshot of your entire business by running various reports in the Multi-Office Manager (MOM).

EF data is updated continuously as we process new information about your returns. You can convert these reports to Microsoft Access® or Excel® files.

New Returns by Ack Date Summary  
Records Returned: 4 Page: 1 Lines per Page: 20

EFIN	Total Returns	Rjctd	Pending	Acptd	Pct Acptd	Bank Total	Bank Pct Acptd	Prep Total	Prep Accts Paid	Prep Avg Fee	Prep Dpstd	Prep Pending	Prep Acptd Pending Total	Prep Acptd to Pending
777771	794	0	0	794	100.00	748	94.21	\$71,352.00	729	\$95.39	\$69,742.00	\$0.00	\$71,352.00	97.19
777776	506	0	0	506	100.00	479	94.66	\$46,747.00	463	\$97.59	\$45,757.00	\$0.00	\$46,747.00	97.70
777777	766	2	8	756	98.69	732	96.83	\$71,937.00	713	\$98.27	\$70,442.00	\$832.00	\$72,769.00	97.13
777778	779	0	32	747	95.89	654	87.55	\$65,143.00	640	\$99.61	\$64,213.00	\$2,772.00	\$67,915.00	98.17
<b>TOTALS</b>	<b>2845</b>	<b>2</b>	<b>40</b>	<b>2803</b>		<b>2613</b>		<b>\$256,179.00</b>	<b>2645</b>		<b>\$250,154.00</b>	<b>\$3,604.00</b>	<b>\$258,783.00</b>	<b>99.19</b>

Report created on 2/11/2011 10:33:27 AM Page 1 of 1

## Flagged Fields

Flagged fields help prevent mistakes, as they force you to verify important data-entry fields before finalizing the return. Flag fields as you go, or set flags globally for all new returns. Flagged fields eliminate the possibility of mistakes and enable you to remain in control of the return and your progress.

Drake 2010 - Data Entry (400001904 - Michael, Samuelson & Elizabeth - 400001905)

### Schedule A - Itemized Deductions

TSJ  J  F  ST  City

**Medical and Dental**

1 Health insurance premiums.....

Long-term care premiums.....

Number of medical miles.....

Other medical and dental expenses.....

**Taxes You Paid**

5 Income taxes..... +/-

General sales tax..... See [STAX](#) screen.....

6 Real estate..... +/-

Taxes that qualify for State Property Tax Credit.....

Page: 1 2 3 4 5 6 7 8 Lines per Page: 20

Preparer	Filing Status	Profession	Type	Started	Completed	Last Change	Status	Noted	Bank Deposits	Bank Disposition Date	Client Payment	Client Payment Date	Total Fee	Fees Remaining
Ryan McClure	2	0	Individual (1040)	02-01-2010	02-01-2010	02-02-2010	ADMIN	\$10,642.00 (\$264.67)	\$0.00		\$0.00		\$264.67	\$0.00
Edward	2	0	Individual (1040)	01-19-2010	01-19-2010	01-30-2010	ADMIN	\$2,476.00 \$0.00	\$0.00		\$0.00		\$25.00	\$0.00
ADMIN	2	0	Individual (1040)	02-04-2010	02-04-2010	02-23-2010	ADMIN Complete	\$099.00 \$0.00	\$0.00		\$0.00		\$49.00	\$0.00
Carol Davis	0	0	Sub-S (1120S)	02-10-2010	02-10-2010	05-05-2010	ADMIN	\$0.00 \$0.00	\$0.00		\$0.00		\$0.00	\$0.00
Michael	1	1	Sub-S (1120S)	01-19-2010	01-19-2010	05-12-2010	ADMIN	\$0.00 \$0.00	\$0.00		\$0.00		\$1,100.00	\$0.00
Carol Davis	1	0	Individual (1040)	02-10-2010	02-10-2010	02-10-2010	ADMIN	\$0.00 \$0.00	\$0.00		\$0.00		\$49.00	\$0.00
Carol Davis	0	0	Sub-S (1120S)	02-04-2010	02-04-2010	05-05-2010	ADMIN	\$0.00 \$0.00	\$0.00		\$0.00		\$400.00	\$0.00
Carol Davis	4	0	Individual (1040)	02-08-2010	02-08-2010	04-09-2010	ADMIN Printed	\$282.00 \$0.00	\$0.00		\$0.00		\$74.00	\$0.00
Ryan McClure	2	0	Individual (1040)	01-11-2010	01-11-2010	01-21-2010	ADMIN	\$10,975.00 (\$125.00)	\$0.00		\$0.00		\$240.00	\$0.00
Jane Gardner	0	0	Corporate (1120)	01-09-2010	01-09-2010	01-11-2010	ADMIN	\$88.00 \$0.00	\$0.00		\$0.00		\$0.00	\$0.00
Frank Palmer	1	0	Individual (1040)	02-05-2010	02-05-2010	02-05-2010	ADMIN	\$83.00 \$0.00	\$0.00		\$0.00		\$126.00	\$0.00

**Multi-Office Manager (MOM)** > Combine information on paper or e-filed returns from multiple offices into one database, allowing you to track all of your offices from one simple-to-use interface. This tool works via the Internet and with the Client Status Manager as it sends electronic transmissions to Drake, combining them automatically into one database.



## Free yourself from traditional bank products

Use e-Collect™ as a simple and inexpensive way for your customers to pay your fees out of their refunds. e-Collect™ is fully integrated into Drake Software, so there's no need to exit the program to process the information. It's convenient for you and your customers: no accounts receivable, no collection hassles, and no merchant account fees ... and your customers can use direct deposit!

Disbursement options include:

- > e-Direct - Refund is directly deposited into client's bank account
- > e-Check - Check printed in your office
- > E1 Visa® Prepaid Card - Debit card activated once funds are released

Taxpayers can choose to have their tax-preparation fees withheld from their refund proceeds and paid directly to you. It's possibly the best choice for you and your customers.



*Over 7,000 users in 2010*

## Choose from Three Program Levels

**e-Collect™ Basic** > The ideal option if you don't want to worry about check and E1 Card stock inventory. This program option is free for you to offer to your customers.

- > No checks, no cards – simply provides a direct-deposit option for your customers to pay their tax-preparation fees. (No Enrollment Fee)

**e-Collect™ Deluxe** > Perfect for offices that want to offer their customers options but may not want to deal with card stock. (\$15 Enrollment Fee)

**e-Collect™ Elite** > The best choice if you want to offer the whole suite of e-Collect™ disbursement options: E1 Card, direct deposit, and check. (\$30 Enrollment Fee)

- > Enrollment fee covers all supplies, including check stock and instant issue prepaid card inventory.
- > You'll receive detailed instructions on how e-Collect™ works.
- > All customer applications are automatically generated in the Drake tax program.
- > Marketing materials are provided online as downloadable files for your office.

*"It is my opinion that the e-Collect's program is by far the best option in the market. The best price and lowest prices for the customers which keep them happy and coming back."*

**David > Second Year e-Collect Customer**



## Minimum System Requirements

### Windows XP

- > 300 MHz processor or higher
- > 128 MB of RAM

### Windows Vista & Windows 7

- > 800 MHz processor or higher
- > 512 MB of RAM
- > Support for Super VGA graphics

### All Windows Operating Systems

- > CD Drive
- > 200 MB of available hard drive space, plus 7 MB for each state program
- > Internet Explorer 7.0
- > Internet access
- > HP — compatible laser printer (*strongly recommended*)
- > TWAIN — compliant scanner (*strongly recommended*)
- > Internet access (*required for regular updates*)

These are the minimum requirements to run Drake Software on most systems. For superior performance, we recommend system upgrades above the stated minimums. Actual requirements will vary based on your system configuration, in addition to which application and features you wish to install.

### Network Capabilities

Whether you're an office of one or 100, it's easy to network Drake Software with a dedicated server or peer-to-peer network.

"The first thing I noticed was how fast Drake is compared to other software. The second thing I love is the quick navigation. And I'd like to mention what a great value Drake Software is. I not only get a great tax preparation package, but tax research, a write-up package, and more. The program is reasonably priced and includes all of the additional programs. One of the best things I always say about a company is 'no surprises!' In the seven years I've been using the software there have been... no surprises!"

Tab > Valued Customer Since 2004

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