

Beyond the Basics: Return Prep in Drake Tax for Individuals

Course Description: This course walks you through data entry for tax return preparation beyond the basic return. You will learn how to enter various items for an individual return including:

- Identify steps to enter data for Schedule A
- Recall options for entries for Form 8949 and Schedule D
- Explain how to enter file Form 1040X
- Describe the process to enter office in home

Course Fee: \$59

How to Register: Log in to www.Support.DrakeSoftware.com and select **Training > Classroom Training** from the menu on the left side of the web page. Refer to the **FAQs** on the web page for detailed instructions and frequently asked questions.

CPE Facts:

Affiliation*	CPE Awarded	Delivery Method / Course Format	Field of Study	Course ID #	Sponsor ID #
NASBA	3	Internet Based	Specialized Knowledge and Applications	N/A	103137
CTEC	0	N/A	N/A	N/A	3038
IRS	3	Online/Group	Federal Tax Law	FQTGU-T-000380-20-O	FQTGU
TX State Board of Accountancy	3	Internet Based	Specialized Knowledge and Applications	100325	002921

*Individuals with other professional credentials should check with their state licensing board or accrediting organization to determine if this program meets their continuing education requirements.

Course Level: Basic

Prerequisites/Advance Preparation: Students should have an understanding of basic tax terminology.

Course Policies: Refund requests must be sent in writing to the Drake Software Education Department via mail, fax, or email. 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 or Education@DrakeSoftware.com or visit www.DrakeETC.com.



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