



FEDERAL FACT SHEETS

DrakeSoftware[®]

Professional Tax Solutions

Software Features Included In All Packages

- Integrated access to tax research from TheTaxBook (requires a separate purchase)
- e-File included at no additional cost
- State calculations and e-file included at no additional cost
- e-File available for FinCEN (FBAR) at no additional cost
- Federal information flows to state returns
- Software updates delivered online
- Client data updated from year to year
- Prior-year comparisons
- Diagnostic notes and e-file messages (available in Spanish)
- Hyperlinks from screen to screen for quick data entry
- Autofill available for amended returns
- PDF attachments available for e-file
- Option to pay > collect preparer fees through e-Pay
- K-1 export from 1041, 1065, and 1120S to all packages
- Schedule D import
- 4562 asset import
- Print returns as PDF
- Print "sets" of a return: federal, state, client, preparer
- Print preparer and ERO e-signatures
- Proformas and organizers (1040 organizer only)
- Screens and help files available in Spanish

Data Conversions

Software	1040	1041	1065	1120	1120S
ATX™	✓	✓	✓	✓	✓
Crosslink®	✓				
Lacerte®	✓	✓	✓	✓	✓
ProSeries®	✓	✓	✓	✓	✓
ProSystem FX®	✓		✓	✓	✓
TaxAct®	✓				
TaxSlayer Pro®	✓				
TaxWise®	✓	✓	✓	✓	✓
TurboTax®	✓				
UltraTax®	✓	✓	✓	✓	✓

TurboTax® files must be sent to Drake for conversion.



Quick Facts

- Electronic funds withdrawal for 1040, 1040-ES, 2350, and 4868
- Extra due diligence assistance for refundable credits
- Import data from GruntWorx
- Import data from Quickbooks
- Import K-1s from 1120S, 1065, and 1041 packages
- Import assets from spreadsheet
- MFJ returns split into MFS returns
- More than 225 forms, schedules, and worksheets included
- Sorting of interest and dividend entries
- Tax Planner for forecasting client scenarios
- W-2 Import
- Summary of carryovers to next year
- Diagnostic notes and e-file messages available in Spanish
- Many forms offered in Spanish

Source Documents Processed (includes but is not limited to)

- 1042-S, Foreign Person's U.S. Source Income Subject to Withholding
- 1042-S-RRB, Nonresident Alien Railroad Retirement Benefits
- 1042-S-SSA, Nonresident Alien Social Security Benefits
- 1095-A, Health Insurance Marketplace Statement
- 1098, Mortgage Interest Statement
- 1098-C, Contributions of Motor Vehicles, Boats, and Airplanes
- 1099-C, Cancellation of Debt
- 1099-G, Certain Government Payments
- 1099-INT, Interest Income
- 1099-DIV, Dividends and Distributions
- 1099-MISC, Miscellaneous Income
- 1099-OID, Original Issue Discount
- 1099-PATR, Taxable Distributions Received from Cooperatives
- 1099-R, Distributions from Pensions, Annuities, Retirement, etc.
- 1099-RRB, Railroad Retirement Benefits
- 1099-SSA, Social Security Benefits
- W-2, Wage and Tax Statement
- W-2G, Certain Gambling Winnings

Schedules

- Schedule A, Itemized Deductions
- Schedule B, Interest and Ordinary Dividends
- Schedule C, Profit or Loss from Business
- Schedule D, Capital Gains and Losses
- Schedule D, Capital Gains and Losses - AMT
- Schedule E, Supplemental Income and Loss
- Schedule EIC, Earned Income Credit
- Schedule F, Profit or Loss from Farming
- Schedule H, Household Employment Taxes
- Schedule J, Income Averaging for Farmers and Fishermen
- Schedule R, Credit for the Elderly or the Disabled
- Schedule SE, Self-Employment Tax
- Schedule 8812, Additional Child Tax Credit

Comprehensive Calculations

- Adjusted qualified education expenses
- Alternative Minimum Tax
- At-risk limitations
- Auto expense calculations
- Automatic calculation of ES payment due next year
- Bargain sale calculations for Form 8283
- Basis limitations and tracking for Schedules K-1
- Business income limitation for Section 179

- Casualty loss including disaster loss
- Certification for late rollover contribution
- Charitable contribution carryover tracking
- Charitable contribution limitation
- Coverdell ESA distribution and basis calculations
- Deductible state income tax for COLA
- Deduction for business use of home
- Deduction for office in home simplified method
- Depletion calculations
- Disaster distributions from retirement accounts
- Estimated tax for next year
- Excess Social Security tax withheld
- FAFSA worksheet
- Federal and state depreciation differences
- Foreign earned income tax calculations
- Foreign income exclusion
- General business credit carryover tracking
- Group sales of depreciable assets
- IRC 965 Transition Tax
- Iterative calculation for reconciling Premium Tax Credit with Self-Employed Health Insurance deduction
- Late filing penalties
- Late payment interest and penalty calculation
- Lump-sum distributions for Form 4972
- Maximum IRA deduction
- Maximum Roth IRA contribution
- Ministerial income calculations
- Modified adjusted gross income calculations
- MSA contribution limits
- NOL calculation and tracking
- Nonrecaptured net Section 1231 loss carryover tracking
- Passive activities and PTPs
- Premium tax credit reconciliation
- Qualified Small Employer Health Insurance Arrangement
- Rental property partially owned
- Rental property used partially for personal use
- Roth IRA basis computation and tracking
- Sale of home
- Sales tax vs. state income tax
- Section 199A - Qualified Business Income (QBI)
- Section 199A - Aggregations
- Section 199A - Safe Harbor Elections
- Self-employed health insurance deduction
- Self-employed rate and deduction for SEP contributions
- Simplified general rule for taxable retirement
- Standard deduction calculations for dependents
- State and local general sales tax deduction
- Suspended losses
- Tax-preference items
- Taxable Social Security Benefits
- Taxable Social Security Benefits on lump-sum payments
- Taxable portion of IRA distributions
- Taxable portion of state and local income tax refund including maximization when AMT is present
- Unallowed passive activity loss tracking
- Underpayment penalty
- Unlimited number of fixed assets, installment sales, publicly traded partnerships
- Unrecaptured Section 1250 gain tracking
- Vacation homes
- Worldwide qualified dividends and capital gains

Form 1041

Quick Facts

- Electronic funds withdrawal for 1041, amended 1041, and 7004
- Export beneficiary K-1s into 1040, 1041, 1065, and 1120S packages
- Form 1041-A and Form 5227 are not eligible for e-file
- More than 120 forms, schedules, and worksheets included
- Unlimited grantor statements
- Up to 1,000 beneficiaries supported
- Summary of carryovers to next year

Source Documents Processed (includes but is not limited to)

- 1099-INT, Interest Income
- 1099-DIV, Dividends and Distributions
- 1099-OID, Original Issue Discount
- 1099-PATR, Taxable Distributions Received from Cooperatives
- 1099-R, Distributions from Pensions, Annuities, Retirement, etc.
- W-2, Wage and Tax Statement
- W-2G, Certain Gambling Winnings

Schedules

- Schedule C, Profit or Loss from Business
- Schedule D, Capital Gains and Losses
- Schedule E, Supplemental Income and Loss
- Schedule F, Profit or Loss from Farming
- Schedule H, Household Employment Taxes
- Schedule I, Alternative Minimum Tax - Estates and Trusts
- Schedule J, Accumulation Distribution for Certain Complex Trusts
- Schedule K-1, Beneficiary's Share of Income & Supplemental Forms and Schedules

Comprehensive Calculations

- Adjusted gross income
- Allocation of deductions to taxable and tax-exempt income
- At-risk limitations
- Deduction for office in home simplified method
- Established Small Business Trust tax computation
- Estate tax deduction
- Estimated tax for next year
- Foreign earned income tax calculations
- General business credit carryover tracking
- Grantor trust
- Group sales of depreciable assets
- Household employment taxes
- Lump-sum distributions for Form 4972
- Modified adjusted gross income calculations
- NOL calculation and tracking
- Oil and gas depletion
- Passive activities and PTPs
- Underpayment penalty
- Qualified disability trust exemption calculations
- Rental property partially owned
- Rental property used partially for personal use
- Section 199A, Qualified Business Income (QBI)
- Section 199A, Safe Harbor Elections
- Suspended losses
- Underpayment of estimated tax penalty
- Unrecaptured Section 1250 gain tracking
- Worldwide Qualified Dividends and Capital Gains

Form 1065

Quick Facts

- Drake Tax custom trial balance import module
- e-File available for amended Form 1065
- e-File short-year, 52-53-week year, and inactive returns
- Election for 52-53-week tax year
- Export partner K-1s into 1040, 1041, 1065, 1120, and 1120S packages
- Information flows from Schedule K to Schedules K-1 automatically
- More than 100 forms, schedules, and worksheets included
- Partner special allocations allowed by dollar amount and percentage
- Predefined IRC elections
- Unlimited number of ownership changes
- Unlimited partners supported

Schedules

- Schedule B-1, Information on Partners Owning 50% or More
- Schedule B-2, Election Out of the Centralized Partnership Audit Regime
- Schedule C, Additional Information for Schedule M-3
- Schedule D, Capital Gains and Losses
- Schedule F, Profit or Loss From Farming
- Schedule K-1, Partner's Share of Income & Supplemental Forms and Statements
- Schedule M-3, Net Income (Loss) Reconciliation for Certain Partnerships

Comprehensive Calculations

- Accumulated book or tax depreciation and amortization carried to Schedule L balance sheet
- Bargain sale calculations for Form 8283
- Book-to-tax adjustments
- Business activity calculations for entity and partners
- Business income limitation for Section 179
- Capital account reconciliation
- Depreciation detail for COGS, Schedule F, Form 8825, Other Rental and Section 754
- Expense and Schedules M-1 or M-3 book-to-tax adjustments for credits
- Income and capital reconciliation for Schedule M-1 and M-3
- Multiple foreign transaction calculations
- Oil and gas depletion
- Partner's adjusted basis calculation
- Royalty calculations
- Schedule M-1, M-3, or Form 8916A adjustments for book-to-tax depreciation and amortization differences
- Section 179 disposition for entity and partners
- Section 199A, Qualified Business Income (QBI)
- Section 199A, Aggregations
- Section 199A, Safe Harbor Elections
- Self-employment earnings calculations
- State apportionments
- Weighted-average ownership calculations for profit, loss, and capital percentage changes during the tax year
- Unused section 179 carryover tracking

Form 1120

Quick Facts

- Drake Tax custom trial balance import module
- e-File available for amended Form 1120
- e-File short year, 52-53-week year, and inactive returns
- Electronic funds withdrawal for 1120, 1120X, and 7004
- Import data from Quickbooks
- Predefined IRC elections
- More than 120 forms, schedules, and worksheets included
- Summary of carryovers to next year

Schedules

- Schedule D, Capital Gains and Losses
- Schedule G, Certain Person Owning Voting Stock
- Schedule M-3, Net Income (Loss) Reconciliation
- Schedule N, Foreign Operations of U.S. Corporations
- Schedule O, Consent Plan and Apportionment Schedule for a Controlled Group
- Schedule PH, Personal Holding Company Tax
- Uncertain Tax Position Statement

Comprehensive Calculations

- Accumulated book-to-tax depreciation and amortization carried to Schedule L balance sheet

- Adjusted current earnings calculation
- Bargain sale calculations for Form 8283
- Book-to-tax adjustments
- Business income limitation for Section 179
- Contribution limitations and carryover tracking
- Depreciation detail for COGS and Schedule F
- Dividends received deduction calculation
- Expense and Schedule M-1 or Schedule M-3 book-to-tax adjustments for credits
- General business credit carryover tracking
- NOL calculations, tracking, and carrybacks
- Nonpatronage NOL Deduction
- Oil and gas depletion
- Personal holding company tax calculations
- Personal service corporation tax calculations
- State apportionment
- Schedule M-1, M-3, or Form 8916A adjustment made for book-to-tax depreciation and amortization differences
- Section 1231 loss tracking
- Section 170 (d)(2)(B) calculation for unused contributions
- Underpayment of estimated tax penalty
- Unused Section 179 carryover tracking
- Unused tax credit carryover tracking

Form 1120S

Quick Facts

- Drake Tax custom trial balance import module
- e-File available for amended Form 1120S
- e-File short-year, 52-53-week year, and inactive returns
- Electronic funds withdrawal for 1120S, amended 1120S, and 7004
- Export shareholder K-1s into 1040 and 1041 packages
- Information flows from Schedule K to Schedule K-1 automatically
- More than 110 forms, schedules, and worksheets included
- Predefined IRC elections
- Unlimited number of ownership changes
- Unlimited shareholders supported

Schedules

- Schedule B-1, Information on Certain Shareholders of an S Corporation
- Schedule D, Capital Gains and Losses
- Schedule K-1, Shareholder's Share of Income & Supplemental Forms and Statements
- Schedule M-3, Net Income (Loss) Reconciliation for S Corporations
- Schedule N, Foreign Operations of U.S. Corporations

Comprehensive Calculations

- Accumulated book or tax depreciation and amortization carried to Schedule L balance sheet
- Bargain sale calculations for Form 8283
- Book-to-tax adjustments
- Built-in capital gains tax
- Business activity calculations for entity and shareholders
- Business income limitation for Section 179
- Depreciation detail for COGS, Form 8825 and Other Rental
- Excess net passive income tax
- Expense and Schedule M-1 or Schedule M-3 book-to-tax adjustments for credits

- Income and capital reconciliation for Schedules M-1 and M-3
- Multiple foreign transaction calculations
- Oil and gas depletion
- Royalty calculations
- Schedule M-1, M-3, or Form 8916A adjustment made for book-to-tax depreciation and amortization differences
- Section 179 disposition for entity and shareholders
- Section 199A, Qualified Business Income (QBI)
- Section 199A, Aggregations
- Section 199A, Safe Harbor Elections
- Shareholder adjusted basis calculations
- Shareholder distribution calculations
- State apportionment
- Underpayment of estimated tax penalty
- Unused Section 179 carryover tracking
- Weighted average ownership calculations for changes in ownership



Form 706

Quick Facts

- Current-year and prior-year 706 calculations
- Form 706, schedules, and statements are not eligible for e-file
- More than 30 forms, schedules, worksheets, and statements
- Option to have entries on Estate Property screen flow to Schedule M

Schedules

- Schedule A, Real Estate
- Schedule A-1, Section 2032A Valuation
- Schedule B, Stocks and Bonds
- Schedule C, Mortgages, Notes, and Cash
- Schedule D, Insurance on the Decedent's Life
- Schedule E, Jointly Owned Property
- Schedule F, Miscellaneous Property
- Schedule G, Transfers During Decedent's Life
- Schedule H, Powers of Appointment
- Schedule I, Annuities
- Schedule J, Funeral Expenses

- Schedule K, Debts
- Schedule L, Net Losses during Administration
- Schedule M, Bequests to Surviving Spouse
- Schedule O, Charitable Gifts
- Schedule P, Credit for Foreign Death Taxes
- Schedule PC, Protective Claim for Refund
- Schedule Q, Credit for Tax on Prior Transfers
- Schedule R, Generation-Skipping Transfer Tax
- Schedule R-1, Generation-Skipping Transfer Tax Payment Voucher
- Schedule U, Qualified Conservation Easement Exclusion

Comprehensive Calculations

- Charitable deductions
- Marital deductions
- Section 6166 deferred payments
- Taxable gift reconciliation

Form 709

Quick Facts

- Automatically generates returns for a husband and wife
- Fast entry of recurring gifts during the year
- Form 709, schedules, and statements are not eligible for e-file
- Taxpayer name and address information transfers from Form 1040
- Tracks the use of the unified credit

Comprehensive Calculations

- Charitable deduction
- Each donee's annual exclusion
- Gifts to a qualified state tuition program
- Split gifts

Form 990

Quick Facts

- Drake Tax custom trial balance import module
- e-File available for amended Form 990
- Electronic funds withdrawal for 990-PF, amended 990-PF, and 8868
- Form 990-T and related credits are not eligible for e-file (IRS adding e-file for 2020)
- More than 65 forms, schedules, and worksheets included
- Predefined IRC elections
- General business credit carryover tracking

Schedules

- Schedule A, Public Charity Status and Public Support
- Schedule B, Schedule of Contributors
- Schedule C, Political Campaign and Lobbying Activities
- Schedule D, Supplemental Financial Statements
- Schedule E, Schools
- Schedule F, Statement of Activities Outside the United States
- Schedule G, Supplemental Information Regarding Fund-Raising or Gambling Activities
- Schedule H, Hospitals
- Schedule I, Grants and Other Assistance to Organizations, Governments, and Individuals

- Schedule J, Compensation Information
- Schedule K, Supplemental Information on Tax-Exempt Bonds
- Schedule L, Transactions with Interested Persons
- Schedule M, Noncash Contributions
- Schedule N, Liquidation, Termination, Dissolution, or Significant Disposition of Assets
- Schedule O, Supplemental Information to Form 990
- Schedule R, Related Organizations and Unrelated Partnerships

Comprehensive Calculations

- 990-T corporation and trust tax calculations
- Autobalance of retained earnings or function balances
- Contribution limitation calculations (990-T only)
- Contribution carryover calculations (990-T only)
- Excess 2% limitation contributors
- Schedule A - 2% excess contribution calculation

Form	Description	1040	1041	1065	1120	1120S	990	706	709
1040	U.S. Individual Income Tax Return	✓							
1040-ES	Estimated Tax Payment Voucher for Individuals	✓							
1040-NR	U.S. Nonresident Alien Income Tax Return	✓							
1040-SR	U.S. Tax Return for Seniors	✓							
1040-V *	Payment Voucher	✓							
1040-X *	Amended U.S. Individual Income Tax Return	✓							
1041	Income Tax Return for Estates and Trusts		✓						
1041-A*	Trust Accumulation of Charitable Amounts		✓						
1041-ES	Estimated Income Tax for Estates and Trusts		✓						
1041-T *	Allocation of Estimated Tax Payments to Beneficiaries		✓						
1041-V *	Fiduciary Payment Voucher		✓						
1065	U.S. Return of Partnership Income			✓					
1120	U.S. Corporation Income Tax Return				✓				
1120-C *	U.S. Income Tax Return for Cooperative Associations				✓				
1120-H *	U.S. Homeowners Association Income Tax				✓				
1120-W *	Estimated Tax for Corporations				✓				
1120-X	Amended U.S. Corporation Income Tax Return				✓				
1120-S	U.S. Income Tax Return for an S Corporation					✓			
706 *	Estate and Generation-Skipping Transfer Tax Return							✓	
706-A *	Additional Estate Tax Return							✓	
706-CE *	Certificate of Payment of Foreign Death Tax							✓	
706-NA*	Estate and Generation-Skipping Transfer Tax Return for Nonresidents							✓	
706-QDT *	Estate Tax Return for Qualified Domestic Trusts							✓	
709 *	U.S. Gift Tax Return								✓
712 *	Life Insurance Statement							✓	
990	Return of Organization Exempt from Income Tax						✓		
990-EZ	Return of Organization Exempt from Income Tax - Short Form						✓		
990-N	e-Postcard for Small Exempt Organizations						✓		
990-PF	Return of Private Foundation						✓		
990-T *	Exempt Organization Business Income Tax Return						✓		
990-W*	Estimated Tax for Tax-Exempt Organizations						✓		
56	Notice Concerning Fiduciary Relationship	✓	✓						
114	Report of Foreign Bank and Financial Accounts	✓	✓	✓	✓	✓	✓		
114a *	Record of Authorization to Electronically File FBARS	✓	✓	✓	✓	✓	✓		
843 *	Claim for Refund and Request for Abatement	✓			✓	✓	✓	✓	✓
851	Affiliation Schedule				✓				
911 *	Request for Taxpayer Advocate Service Assistance	✓	✓	✓	✓	✓		✓	
965	Inclusion of Deferred Foreign Income (and related schedules)	✓		✓	✓	✓			
965-A	Individual Report of Net 965 Tax Liability	✓							
965-B	Corporate and REIT Report of Net 965 Tax Liability	✓			✓				
965-C	Transfer Agreement Under Section 965(h)(3)	✓			✓				
965-D	Transfer Agreement Under Section 965(i)(2)	✓	✓	✓	✓	✓			
965-E	Consent Agreement Under Section 965(i)(4)(D)	✓	✓	✓		✓			
966 *	Corporate Dissolution or Liquidation				✓	✓			
970	Application to Use LIFO Inventory Method	✓							
982	Reduction of Tax Attributes	✓		✓	✓	✓			
1045 *	Application for Tentative Refund	✓	✓						
1045 AMT *	Application for Tentative Refund - AMT	✓	✓						
1116	Foreign Tax Credit	✓	✓						
1116 AMT *	Foreign Tax Credit - AMT	✓	✓						

*Form cannot be e-filed.

Form	Description	1040	1041	1065	1120	1120S	990	706	709
1118	Foreign Tax Credit - Corporations (and related schedules)				✓		✓		
1122	Authorization and Consent of Subsidiary Corporation				✓				
1125-A	Cost of Goods Sold			✓	✓	✓			
1125-E	Compensation of Officers				✓	✓			
1139 *	Corporation Application for Tentative Refund				✓				
1310	Statement of Person Claiming Refund Due a Deceased Taxpayer	✓							
2106	Employee Business Expenses	✓							
2120	Multiple Support Declaration	✓							
2210	Underpayment of Estimated Tax	✓	✓						
2210-F	Underpayment of Estimated Tax by Farmers and Fishermen	✓	✓						
2220	Underpayment of Estimated Tax by Corporations				✓	✓			
2350	Application for Extension of Time to File	✓							
2439	Notice to Shareholder of Undistributed Long-Term Capital Gains	✓	✓		✓	✓			
2441	Child and Dependent Care Expenses	✓							
2553 *	Election by a Small Business Corporation				✓	✓			
2555	Foreign Earned Income	✓							
2848 *	Power of Attorney	✓	✓	✓	✓	✓	✓		
3115	Application for Change in Accounting Method	✓	✓	✓	✓	✓	✓		
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	✓	✓	✓	✓	✓			
4466	Application for Quick Refund of Overpayment of Estimated Tax				✓				
4506 *	Request for Copy of Tax Return	✓							
4506-F *	Identity Theft Victim's Request for Copy of Fraudulent Tax Return	✓							
4506-T *	Request for Transcript of Tax Return	✓							
4562	Depreciation and Amortization	✓	✓	✓	✓	✓	✓		
4684	Casualties and Thefts	✓	✓	✓	✓	✓			
4720 *	Return of Certain Excise Taxes						✓		
4768 *	Application for Extension to Pay Estate Taxes							✓	
4797	Sales of Business Property	✓	✓	✓	✓	✓			
4797 AMT *	Sales of Business Property - AMT	✓	✓						
4835	Farm Rental Income and Expenses	✓							
4852 *	Substitute Form W-2 and 1099-R	✓							
4868	Application for Automatic Extension to File Form 1040	✓							
4952	Investment Interest Expense Deduction	✓	✓						
4952 AMT *	Investment Interest Expense Deduction - AMT	✓	✓						
4970	Tax on Accumulation of Distribution of Trusts	✓	✓						
4972	Tax on Lump-Sum Distributions	✓	✓						
5227 *	Split-Interest Trust Information Return		✓						
5329	Additional Taxes on Qualified Plans	✓							
5405	Repayment of First-Time Homebuyer Credit	✓							
5471	Information Return of U.S. Persons with Respect to Certain Foreign Corporations	✓		✓	✓	✓	✓		
5472	Information Return of a 25% Foreign-Owned U.S. Corporation				✓				
5695	Residential Energy Credits	✓							
5884	Work Opportunity Credit	✓	✓	✓	✓	✓	✓		
5884-A*	Credits for Affected Disaster Area Employers	✓	✓	✓	✓	✓			
6198	At-Risk Limitations	✓	✓						

*Form cannot be e-filed.

Form	Description	1040	1041	1065	1120	1120S	990	706	709
6198 AMT *	At-Risk Limitations - AMT	✓	✓						
6251	Alternative Minimum Tax - Individuals	✓							
6252	Installment Sale Income	✓	✓	✓	✓	✓			
6478	Biofuel Producer Credit	✓	✓	✓	✓	✓	✓		
6765	Credit for Increasing Research Activities	✓	✓	✓	✓	✓			
6781	Gains and Losses from Section 1256 Contracts and Straddles	✓	✓	✓	✓	✓			
7004	Application for Automatic Extension		✓	✓	✓	✓			
8050	Direct Deposit of Corporate Tax Refund				✓	✓			
8082	Notice of Inconsistent Treatment	✓	✓	✓	✓	✓			
8275	Disclosure Statement	✓	✓						
8275-R	Regulation Disclosure Statement	✓	✓						
8283	Noncash Charitable Contributions	✓		✓	✓	✓			
8288-A *	Statement of Withholding on Dispositions by Foreign Persons of U.S. Real Property	✓							
8308	Report of a Sale or Exchange of Certain Partnership Interests			✓					
8332 *	Release of Claim to Exemption for Child by Custodial Parent	✓							
8379	Injured Spouse Allocation	✓							
8396	Mortgage Interest Credit	✓							
8453 *	U.S. Individual Income Tax Transmittal for an IRS e-File Return	✓							
8453-FE *	1041 Declaration for an e-File Return		✓						
8582	Passive Activity Loss Limitations	✓	✓						
8582 AMT *	Passive Activity Loss Limitations - AMT	✓	✓						
8582-CR	Passive Activity Credit Limitations	✓	✓						
8586	Low-Income Housing Credit	✓	✓	✓	✓	✓	✓		
8594	Asset Acquisition Statement	✓	✓	✓	✓	✓			
8606	Nondeductible IRAs	✓							
8609 *	Low-Income Housing Credit Allocation and Certification	✓	✓	✓	✓	✓	✓		
8609-A	Annual Statement for Low-Income Housing Credit	✓	✓	✓	✓	✓	✓		
8611	Recapture of Low-Income Housing Credit	✓		✓	✓	✓			
8615	Tax for Certain Children Who Have Unearned Income	✓							
8621	Information Return by a Shareholder of PFIC	✓							
8697	Interest Computation Under the Look-Back Method			✓	✓	✓	✓		
8716	Election to Have Tax Year Other Than a Required Tax Year			✓	✓	✓			
8752 *	Required Payment or Refund Under Section 7519			✓		✓			
8801	Credit for Prior Year Minimum Tax	✓	✓						
8804 *	Annual Return for Partnership Withholding Tax			✓					
8805 *	Foreign Partner's Information Statement of Section 1446 Withholding Tax	✓		✓					
8813 *	Partnership Withholding Tax Payment Voucher			✓					
8814	Parents' Election to Report Child's Interest and Dividends	✓							
8815	Exclusion of Interest from Series EE and I U.S. Savings Bonds	✓							
8820	Orphan Drug Credit	✓	✓	✓	✓	✓			
8821 *	Tax Information Authorization	✓	✓	✓	✓	✓	✓		
8822 *	Change of Address	✓						✓	
8822-B *	Change of Address or Responsible Party - Business	✓	✓	✓	✓	✓	✓		
8824	Like-Kind Exchanges	✓	✓	✓	✓	✓			
8825	Rental Real Estate Income and Expenses of a Partnership or an S Corporation			✓		✓			
8826	Disabled Access Credit	✓	✓	✓	✓	✓	✓		
8827	Credit for Prior Year Minimum Tax - Corporations				✓				
8828	Recapture of Federal Mortgage Subsidy	✓							
8829	Expenses for Business Use of Your Home	✓	✓						
8832	Entity Classification Election			✓	✓	✓			

*Form cannot be e-filed.

Form	Description	1040	1041	1065	1120	1120S	990	706	709
8833	Treaty-Based Return Position Disclosure	✓						✓	
8834	Qualified Electric Vehicle Credit	✓	✓						
8835	Renewable Electricity and Refined Production Credit	✓	✓	✓	✓	✓			
8839	Qualified Adoption Expenses	✓							
8840	Closer Connection Exception Statement for Aliens	✓							
8843	Statement for Exempt Individuals	✓							
8844	Empowerment Zone Employment Credit	✓	✓	✓	✓	✓			
8845	Indian Employment Credit	✓	✓	✓	✓	✓	✓		
8846	Credit for Employer Social Security and Medicare Taxes Paid on Certain Employee Tips	✓	✓	✓	✓	✓	✓		
8853	Archer MSAs and Long-Term Care Insurance Contracts	✓							
8854	Initial and Annual Expatriation Statement	✓							
8855 *	Election to Treat a Qualified Revocable Trust as Part of an Estate		✓						
8857 *	Request for Innocent Spouse Relief	✓							
8859	Carryforward of the D.C. First-Time Homebuyer Credit	✓							
8862	Information to Claim Certain Credits after Disallowance	✓							
8863	Education Credits	✓							
8864	Biodiesel and Renewable Diesel Fuels Credit	✓	✓	✓	✓	✓	✓		
8866	Interest Computation Under the Look-Back Method	✓		✓	✓	✓			
8867	Paid Preparer's Due Diligence Checklist	✓							
8868	Application to File an Extension for Exempt Organization		✓				✓		
8873	Extraterritorial Income Exclusion	✓		✓	✓	✓			
8874	New Markets Credit	✓	✓	✓	✓	✓			
8878 *	IRS e-File Signature Authorization for Forms 4868 or 2350	✓							
8878-A *	IRS e-File Electronic Funds Withdrawal Authorization for Form 7004		✓		✓	✓			
8879 *	IRS e-File Signature Authorization	✓	✓	✓	✓	✓	✓		
8880	Credit for Qualified Retirement Savings Contributions	✓							
8881	Credit for Small Employer Pension Plan Startup Costs	✓	✓	✓	✓	✓			
8882	Credit for Employer-Provided Childcare Facilities and Services	✓	✓	✓	✓	✓			
8883	Asset Allocation Statement Under Section 338			✓	✓	✓			
8885	Health Coverage Tax Credit	✓							
8888	Allocation of Refund	✓							
8889	Health Savings Accounts (HSAs)	✓							
8896	Low Sulfur Diesel Fuel Production Credit	✓	✓	✓	✓	✓			
8900	Qualified Railroad Track Maintenance Credit				✓				
8903	Domestic Production Activities Deduction	✓	✓	✓	✓	✓			
8906	Distilled Spirits Credit				✓				
8908	Energy Efficient Home Credit	✓	✓	✓	✓	✓			
8910	Alternative Motor Vehicle Credit	✓	✓	✓	✓	✓			
8911	Alternative Fuel Vehicle Refueling Property Credit	✓	✓	✓	✓	✓	✓		
8912	Credit to Holders of Tax Credit Bonds	✓	✓	✓	✓	✓	✓		
8915-A	Qualified 2016 Disaster Retirement Plan Distributions and Repayments	✓							
8915-B	Qualified 2017 Disaster Retirement Plan Distributions and Repayments	✓							
8916	Reconciliation of Schedule M-3 Taxable Income				✓				
8916-A	Supplemental Attachment to Schedule M-3			✓	✓	✓			
8917	Tuition and Fees Deduction	✓							
8919	Uncollected Social Security and Medicare Tax on Wages	✓							
8925	Report of Employer-Owned Life Insurance Contracts			✓	✓	✓	✓		
8932	Credit for Employer Differential Wage Payments			✓	✓	✓	✓		
8936	Qualified Plug-in Electric Drive Motor Vehicle Credit	✓	✓						

*Form cannot be e-filed.

Form	Description	1040	1041	1065	1120	1120S	990	706	709
8938	Statement of Specified Foreign Financial Assets	✓	✓	✓	✓	✓	✓		
8941	Credit for Small Employer Health Insurance Premiums	✓	✓	✓	✓	✓	✓		
8948 *	Preparer Explanation for Not Filing Electronically	✓	✓						
8949	Sales and Other Dispositions of Capital Assets	✓	✓	✓	✓	✓			
8949 AMT *	Sales and Other Dispositions of Capital Assets - AMT	✓	✓						
8958	Allocation of Tax Amounts Between Certain Individuals in Community Property States	✓							
8959	Additional Medicare Tax	✓							
8960	Net Investment Income Tax - Individuals, Estates, and Trusts	✓	✓						
8962	Premium Tax Credit	✓							
8971 *	Information Regarding Beneficiaries Acquiring Property From a Decedent							✓	
8971A *	Form 8971 - Schedule A							✓	
8990	Limitation on Business Interest Expense Under Section 163(j)	✓		✓	✓	✓	✓		
8992	U.S. Shareholder Calculation of Global Intangible Low-Taxed Income (GILTI)	✓		✓	✓	✓	✓		
8994	Employer Credit for Paid Family and Medical Leave	✓	✓	✓	✓	✓			
8995	Qualified Business Income Deduction - Simplified Computation	✓	✓						
8995-A	Qualified Business Income Deduction (Schedule A, B, C and D)	✓	✓						
8996	Qualified Opportunity Fund			✓	✓	✓			
8997	Initial and Annual Statement of Opportunity Fund Investments	✓	✓	✓	✓	✓			
9325 *	Acknowledgement and General Information for Taxpayers Who File Electronically	✓							
9465	Installment Agreement Request	✓							
13844 *	Application for Reduced User Fee for Installment Agreements	✓							
14039 *	Identity Theft Affidavit	✓							
FEC	Foreign Employer Compensation	✓							
EF_ACK *	Acknowledgement and General Information for Entities Who File Electronically		✓	✓	✓	✓	✓		
GRS	Grantor Statement for Grantor Type Trusts		✓						
RENT *	Income (Loss) and Expenses from Other Rental Activities for Partnerships and S Corps			✓		✓			
W-4 *	Employee's Withholding Certificate	✓							
W-4P *	Withholding Certificate for Pension or Annuity Payments	✓							
W-7 *	Application for IRS Individual Taxpayer Identification Number	✓							
W-9*	Request for Taxpayer Identification Number and Certification	✓							

*Form cannot be e-filed.

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- Ease of Electronic Filing
- Handling Multistate Business Returns
- Handling of the TCJA
- Most Recommended for New Practices
- Price

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