



FEDERAL FACT SHEETS

Software Features Included In All Products

- 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
- Client data updated from prior year
- Comparison of current- and prior-year returns
- Diagnostic notes and e-file messages (also 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 or collect preparer fees through e-Pay
- K-1 export from 1041, 1065, and 1120-S to all returns
- Schedule D import
- 4562 asset import
- Proformas and Organizers (Organizers available in 1040 product only)
- Screens and help files available in Spanish
- Automatic IRC election statements
- Ability to print:
 - Returns as PDFs
 - "Sets" of a return: federal, state, client, and preparer
 - Preparer and ERO e-signatures

Data Conversions

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

*TurboTax® files must be sent to Drake Tax for conversion.

Customer Ratings

Drake Earns Highest Rating in 26 Categories from Four Industry Surveys!

CPA Practice Advisor

2023 Readers' Choice Awards

- Tax Preparation Software
- Tax Planning Systems
- 1099/W-2 Preparation
- Client Portals for Firms
- Document Management & Storage
- Website Builders
- CPE Provider ASP
- ASP/Hosted Solution Providers —
Drake Software Hosting Powered by
Right Networks

NATP

2021 Tax Software Survey

- Customer Service
- Federal Tax Law Changes/Updates
- State Tax Law Changes/Updates
- Software Conversion Package
- Technical Support
- Reliability of Software
- Customer Retention

AICPA/The Tax Adviser

2022 Tax Software Survey

- Overall Rating
- Ease of Update/Installation
- Ease of Use
- Handling Updates During Tax Season
- Ease of e-Filing
- Handling Multistate Business Returns
- Easy to Get Technical Support
- Quality of Technical Support
- Most Recommended to New Practice

CPA Journal

2022 Annual Survey of NY State Practitioners

- Value for Cost
- Customer Support
- Overall Rating



Quick Facts

- Electronic funds withdrawal for Forms 1040, 1040-ES, 1040-NR, 1040-SR, 1040-SS, 1040-PR, 1040-X, 2350, and 4868
- Due diligence assistance for refundable credits
- Married Filing Jointly (MFJ) returns split into Married Filing Separately (MFS) returns
- 225+ forms, schedules, and worksheets included (many in Spanish)
- Interest and dividends sorting
- Tax Planner™ for forecasting client scenarios
- Summary of carryovers to next year
- Import of:
 - Assets from spreadsheets
 - Forms W-2
 - GruntWorx® data
 - QuickBooks® data
 - Schedules K-1 from 1041, 1065, and 1120-S returns

Source Documents Processed (includes but is not limited to)

- 1042-S, Foreign Person's U.S. Source Income Subject to Withholding
- 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-DIV, Dividends and Distributions
- 1099-G, Certain Government Payments
- 1099-INT, Interest Income
- 1099-MISC, Miscellaneous Information
- 1099-NEC, Nonemployee Compensation
- 1099-OID, Original Issue Discount
- 1099-PATR, Taxable Distributions Received from Cooperatives
- 1099-R, Distributions from Pensions, Annuities, Retirement, etc.
- RRB-1042S, Nonresident Alien Railroad Retirement Benefits
- RRB-1099, Railroad Retirement Benefits
- SSA-1042S, Nonresident Alien Social Security Benefits
- SSA-1099, Social Security Benefits
- W-2, Wage and Tax Statement
- W-2AS, American Samoa Wage and Tax Statement
- W-2CM, Northern Mariana Islands Wage and Tax Statement
- W-2GU, Guam Wage and Tax Statement
- W-2VI, U.S. Virgin Islands Wage and Tax Statement
- W-2PR, Puerto Rico Wage and Tax Statement
- W-2G, Certain Gambling Winnings

Schedules

- Schedule 1, Additional Income and Adjustments to Income
- Schedule 2, Additional Taxes
- Schedule 3, Additional Credits and Payments
- Schedule 8812, Credits for Qualifying Children and Other Dependents
- 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 LEP, Request for Change in Language Preference
- Schedule R, Credit for the Elderly or the Disabled
- Schedule SE, Self-Employment Tax

Comprehensive Calculations

- Adjusted qualified education expenses
- Alternative minimum tax
- At-risk limitations
- 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
- Charitable contribution limitation and tracking
- 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
- 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
- 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
- Oil and gas depletion
- 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 when AMT is present
- Unallowed passive activity loss tracking
- Underpayment penalty
- Unlimited number of fixed assets, installment sales, and publicly traded partnerships
- Unrecaptured section 1250 gain tracking
- Vehicle expense calculations
- Worldwide qualified dividends and capital gains

1041 Product

Quick Facts

- Electronic funds withdrawal for Forms 1041 (including amended) and 7004
- Beneficiary K-1s exportable to 1040, 1041, 1065, and 1120-S returns
- Forms 1041-A and 5227 (not eligible for e-file)
- 120+ forms, schedules, and worksheets included
- Unlimited grantor statements
- Support for up to 1,000 beneficiaries
- Summary of carryovers to next year

Source Documents Processed (includes but is not limited to)

- 1099-DIV, Dividends and Distributions
- 1099-INT, Interest Income
- 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, Deductions, Credits, etc.

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
- Foreign qualified dividends and capital gains
- General Business Credit carryover tracking
- Grantor trust
- Group sales of depreciable assets
- Modified adjusted gross income calculations
- NOL calculation and tracking
- Oil and gas depletion
- Passive activities and PTPs
- 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

1065 Product

Quick Facts

- Trial balance import available
- e-File available for amended Form 1065, short-year, 52-53-week year, and inactive returns
- Partner K-1s exportable to 1040, 1041, 1065, 1120, and 1120-S returns
- Automatic flow of information from Schedule K to Schedules K-1
- 100+ forms, schedules, and worksheets included
- Partner special allocations allowed by dollar amount and percentage
- Unlimited number of ownership changes
- Unlimited number of partners supported
- Summary of carryovers to next year

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 Filers
- Schedule D, Capital Gains and Losses
- Schedule F, Profit or Loss From Farming
- Schedule K-1, Partner's Share of Income, Deductions, Credits, etc.
- Schedule K-2, Partners' Distributive Share Items - International
- Schedule K-3, Partner's Share of Income, Deductions, Credits, etc. - International
- 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 rentals, and section 754
- Expense and Schedules M-1 and 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
- Partner's adjusted inside basis calculation
- Royalty calculations
- Schedules M-1 and M-3, as well as Form 8916-A 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
- Unused section 179 carryover tracking
- Weighted-average ownership calculations for profit, loss, and capital percentage changes during the tax year

1120 Product

Quick Facts

- Trial balance import available
- e-File available for amended Form 1120, short-year, 52-53-week year, and inactive returns
- Electronic funds withdrawal for Forms 1120, 1120-X, and 7004
- Data import from QuickBooks
- 120+ forms, schedules, and worksheets included
- Summary of carryovers to next year

Schedules

- Schedule D, Capital Gains and Losses
- Schedule G, Information on Certain Persons Owning the Corporation's 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, U.S. Personal Holding Company (PHC) 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
- Estimated Tax Worksheet
- 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
- Schedules M-1, M-3, or Form 8916-A 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

1120-S Product

Quick Facts

- Trial balance import available
- e-File available for amended Form 1120-S, short-year, 52-53-week year, and inactive returns
- Electronic funds withdrawal for Forms 1120-S (including amended) and 7004
- Shareholder K-1s exportable to 1040 and 1041 returns
- Automatic flow of information from Schedule K to Schedules K-1
- 110+ forms, schedules, and worksheets included
- Unlimited number of ownership changes
- Unlimited number of shareholders supported
- Summary of carryovers to next year

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, Deductions, Credits, etc.
- Schedule K-2, Shareholders' Pro Rata Share Items - International
- Schedule K-3, Shareholder's Share of Income, Deductions, Credits, etc. - International
- 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 and 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
- Schedules M-1 and M-3, as well as Form 8916-A adjustments 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 inside 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

706 Product

Quick Facts

- Current- and prior-year 706 calculations
- Form 706, schedules, and statements not available for e-file
- 30+ forms, schedules, worksheets, and statements
- Option for certain entries to automatically flow to Schedule M
- Summary of carryovers to next year

Forms and 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

709 Product

Quick Facts

- Automatic returns for taxpayer and spouse
- Ability to easily enter recurring gifts
- Form 709, schedules, and statements not eligible for e-file
- Taxpayer name and address information transfers from Form 1040
- Unified Credit tracking
- Summary of carryovers to next year

Comprehensive Calculations

- Charitable deduction
- Deceased spouse unused exemption (DSUE)
- Each donee's annual exclusion
- Generation skipping-transfer tax
- Gifts to a qualified state tuition program
- Split gifts

990 Product

Quick Facts

- Trial balance import available
- e-File available for amended Form 990
- Forms 4720 (including amended), 8868, 990-PF, and 990-T (including amended)
- 65+ forms, schedules, and worksheets included
- General Business Credit carryover tracking
- Summary of carryovers to next year

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 Fundraising 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
- Form 4720 excise tax
- Autobalance of retained earnings and function balances
- Contribution limitation (990-T only)
- Contribution carryover (990-T only)
- Excess 2% limitation contributors
- Estimated Tax Worksheet

Form	Description	1040	1041	1065	1120	1120-S	706	709	990
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-SS	U.S. Self-Employment Tax Return	✓							
1040-PR	U.S. Self-Employment Tax Return for Bona Fide Residents of Puerto Rico	✓							
1040-V *	Payment Voucher	✓							
1040-X	Amended U.S. Individual Income Tax Return	✓							
1041	U.S. Income Tax Return for Estates and Trusts		✓						
1041-A *	U.S. Information Return 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. Income Tax Return for Homeowners Associations				✓				
1120-S	U.S. Income Tax Return for an S Corporation					✓			
1120-X	Amended U.S. Corporation Income Tax Return				✓				
706 *	United States Estate (and Generation-Skipping Transfer) Tax Return						✓		
706-A *	United States 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 *	U.S. Estate Tax Return for Qualified Domestic Trusts						✓		
709 *	United States Gift (and Generation-Skipping Transfer) 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 Tax-Exempt Organizations Not Required to File Form 990								✓
990-PF	Return of Private Foundation								✓
990-T	Exempt Organization Business Income Tax Return								✓
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	Affiliations 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 Due to Discharge of Indebtedness	✓		✓	✓	✓			
1045 *	Application for Tentative Refund	✓	✓						
1045 AMT *	Application for Tentative Refund - AMT	✓	✓						
1116	Foreign Tax Credit (Schedules B and C)	✓	✓						

*Form cannot be e-filed.

Form	Description	1040	1041	1065	1120	1120-S	706	709	990
1116 AMT *	Foreign Tax Credit - AMT	✓	✓						
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 U.S. Income Tax Return	✓							
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 and Declaration of Representative	✓	✓	✓	✓	✓			
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	Corporation 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 File or Pay U.S. Estate (and Generation-Skipping) 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 Distribution of Trusts	✓	✓						
4972	Tax on Lump-Sum Distributions	✓	✓						
5227 *	Split-Interest Trust Information Return		✓						
5329	Additional Taxes on Qualified Plans	✓							
5405	Repayment of the First-Time Homebuyer Credit	✓							
5471	Information Return of U.S. Persons with Respect to Certain Foreign Corporations	✓		✓	✓	✓			✓
5884	Work Opportunity Credit	✓	✓	✓	✓	✓			✓

*Form cannot be e-filed.

Form	Description	1040	1041	1065	1120	1120-S	706	709	990
5884-A	Employee Retention Credit for Employers Affected by Qualified Disasters	✓	✓	✓	✓	✓			
6198	At-Risk Limitations	✓	✓						
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		✓	✓	✓	✓			
7203	S Corporation Shareholder Stock and Debt Basis Limitations	✓							
8050	Direct Deposit of Corporate Tax Refund				✓	✓			
8082	Notice of Inconsistent Treatment or Administrative Adjustment Request (AAR)	✓	✓	✓	✓	✓			
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/Revocation of Claim to Exemption for Child by Custodial Parent	✓							
8379	Injured Spouse Allocation	✓							
8396	Mortgage Interest Credit	✓							
8453-FE *	U.S. Estate or Trust Declaration for an IRS 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 a 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	✓	✓	✓	✓	✓			✓

Form	Description	1040	1041	1065	1120	1120-S	706	709	990
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			✓	✓	✓			
8833	Treaty-Based Return Position Disclosure	✓					✓		
8834	Qualified Electric Vehicle Credit	✓	✓						
8835	Renewable Electricity, Refined Coal, and Indian Coal Production Credit	✓	✓	✓	✓	✓			
8839	Qualified Adoption Expenses	✓							
8840	Closer Connection Exception Statement for Aliens	✓							
8843	Statement for Exempt Individuals and Individuals with a Medical Condition	✓							
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 Form 4868 or Form 2350	✓							
8878-A *	IRS e-File Electronic Funds Withdrawal Authorization for Form 7004		✓		✓	✓			
8879 *	IRS e-File Signature Authorization for Form 1040	✓							
8879-F	IRS e-File Signature Authorization for Form 1041		✓						
8879-CORP	E-file Authorization for Corporations				✓	✓			
8879-PE	IRS e-File Signature Authorization for Form 1065			✓					
8879-TE	IRS e-File Signature Authorization for a Tax Exempt Entity								✓
8880	Credit for Qualified Retirement Savings Contributions	✓							
8881	Credit for Small Employer Pension Plan Startup Costs and Auto-Enrollment	✓	✓	✓	✓	✓			
8882	Credit for Employer-Provided Childcare Facilities and Services	✓	✓	✓	✓	✓			
8883	Asset Allocation Statement Under Section 338			✓	✓	✓			
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	✓	✓	✓	✓	✓			✓

*Form cannot be e-filed.

Form	Description	1040	1041	1065	1120	1120-S	706	709	990
8915-C	Qualified 2018 Disaster Retirement Plan Distributions and Repayments	✓							
8915-D	Qualified 2019 Disaster Retirement Plan Distributions and Repayments	✓							
8915-F	Qualified Disaster Retirement Plan Distributions and Repayments	✓							
8916	Reconciliation of Schedule M-3 Taxable Income				✓				
8916-A	Supplemental Attachment to Schedule M-3			✓	✓	✓			
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	✓	✓						
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						✓		
8978	Partner's Additional Reporting Year Tax	✓	✓		✓				
8990	Limitation on Business Interest Expense Under Section 163(j)	✓		✓	✓	✓			
8992	U.S. Shareholder Calculation of Global Intangible Low-Taxed Income (GILTI)	✓		✓	✓	✓			
8993	Section 250 Deduction for Foreign Derived Intangible Income (FDII) and 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 (Schedules A, B, C, and D)	✓	✓						
8996	Qualified Opportunity Fund			✓	✓	✓			
8997	Initial and Annual Statement of Qualified Opportunity Fund (QOF) Investments	✓	✓	✓	✓	✓			
9000	Alternative Media Preference	✓							
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	✓							
14039-B *	Business Identity Theft Affidavit	✓	✓	✓	✓	✓			✓
FEC	Foreign Employer Compensation	✓							
EF Notice *	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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