



About Drake

Drake Tax was first marketed in 1977, rapidly growing from a family tax practice into a national brand by providing tax professionals what they need: reliable, affordable software and support.

Located in the beautiful mountains of Western North Carolina, Drake Software employs federal and state programmers, administrative and fulfillment personnel, and customer support staff. Along with our headquarters in Franklin, NC, Drake Software has two call centers in Hayesville and Sylva, NC, as well as development and customer service facilities in Antioch, TN and Virginia Beach, VA. If you are ever in the area, plan a visit to our facilities.

For more information or to schedule a tour, please call **800.890.9500**.



Headquarters

Franklin, NC



Employees

600+



Business Started

1977



Customers

60,000+



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Additional Services

- 5 GruntWorx**
Tax automation service that reduces the time spent preparing each return
- 7 Drake Accounting**
Comprehensive accounting and payroll application that provides multi-location payroll
- 9 Drake Portals**
Client-facing portal that enables safe exchange of client files and off-site data backup

Awards

CPA Practice Advisor

2020 Readers' Choice Awards

Ranked #1

- Federal/State Income Tax Compliance
- Tax Planning Systems
- 1099/W-2 Compliance
- Client Portals
- Document Management and Storage
- Workflow Tools

2019 Review of Drake 5 Stars

2019 Review of Drake Documents 4 & a Half Stars

NATP

2019 Tax Software Survey

Ranked #1

- Overall Satisfaction
- Customer Service
- Federal Tax Law Changes/Updates
- State Tax Law Changes/Updates
- Technical Support
- Reliability

AICPA/The Tax Adviser

2019 Tax Software Survey

Ranked #1

- Overall Rating
- Ease of Receiving Technical Support
- Quality of Technical Support
- Ease of Updates and Installation
- Ease of Use
- Handling Updates during Tax Season
- Transferring Data within Returns
- Ease of Electronic Filing
- Handling Multistate Business Returns
- Handling of the TCJA
- Most Recommended for New Practices
- Price

CPA Journal

The CPA Journal 2019 Annual Survey of NY State Practitioners

Ranked #1

- Overall
- Value
- Customer Support



Support



Award
Winning

Drake Software is known for personal and prompt customer service. Even during the height of tax season, customers wait seconds—not minutes—to speak with a customer support representative.

Email - Support@DrakeSoftware.com

Phone - 828.524.8020

Chat - Access within software

Tax Season Support Hours

Mon-Fri 8 am - 10 pm (ET)

Sat 8 am - 6 pm (ET)

Off-Season Support Hours

Mon-Fri 8 am - 9 pm (ET)

Sat 9 am - 5 pm (ET)

Supported Operating Systems

- Windows 8.1, 10
- Windows Server 2012, 2016, 2019

All operating systems are expected to have the latest updates installed.

Network Capabilities

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

System Recommendations

Operating System - Windows 10 Pro, 64-bit

Processor - 2.0 GHz or faster multi-core processor

RAM - 4 GB or more

Hard Drive - 2 GB or more of available hard drive space (actual space requirements will vary based on the number of clients you serve), and solid-state hard drives (SSDs) can enhance system performance.

Monitor - Capable of 1920 x 1080 resolution

Internet - High-speed Internet is recommended for optimal software performance.

Printer - Windows GDI (Graphical Device Interface) or HP-compatible laser printer

Browser - Internet Explorer (IE) 11 or Edge must be installed (other browsers such as Chrome and Firefox can be used as the default). Web1040 and DrakeZero do not support IE.

Scanner - TWAIN-compliant scanner (for Drake Documents and GruntWorx)

Microsoft® .NET Framework - Version 4.7 or higher

Minimum System Requirements

The following minimum system requirements will support Drake Tax on most systems. For superior performance, we recommend system upgrades above the stated minimums. Actual requirements will vary based on your system configuration and the features and other programs you install.

Processor - 1 GHz processor

RAM - 1 GB for 32-bit OS and 2 GB for 64-bit OS

Hard Drive - 2 GB of available hard drive space

Optical Drive - CD drive (only required for CD service)

Monitor - Capable of 1024 x 768 screen resolution

Internet - Internet access is required for certain features such as e-file, software updates, online help, and PPR purchases.

Tax Solutions

Productivity

Simple Navigation - Quickly toggle between forms, schedules, and completed returns with clicks or keyboard shortcuts.

Flexible Data Entry - Choose how you enter data, define and lock fields, and determine which screens are accessible.

Import and Transfer Data - Streamline your workflow with time-saving features, such as import for 4562 assets, 8949 transactions, and trial balances using Excel-based templates. Eliminate keystrokes by importing electronic W-2s, scanning bar codes on W-2s and K-1s for data import, or exporting K-1 information from entity returns to individual returns.

Go Paperless - With the Drake PDF Printer, you can seamlessly print tax returns to a PDF file, encrypt them with a password, and store those files in the document manager, Drake Documents.

Forms in Spanish - Print 12 different taxpayer forms in Spanish, including Forms W-4, W-7, 2350, and 13844.

Data Entry Toolbar - The toolbar is available on all data-entry screens, letting you use an integrated calculator, clear reminder flags, navigate between screens, and more—all without having to leave the current screen.



Drake Tax includes more than 6,000 federal and state forms and schedules:

- 1040/1040-SR
- 1065
- 1118
- 990-PF
- 1040-NR
- 1120/1120-S
- 3115
- All States
- 114 (FinCEN)
- 1120-H
- 706
- 56
- 4720
- 709
- 1041
- 5471
- 990/990-EZ

Plan Ahead - Analyze current- and next-year scenarios with the Tax Planner. Quickly compare current- and prior-year returns using federal and state comparison sheets.

Client Organizers - Choose from three different organizers—summary organizers, comprehensive organizers, and blank organizers—that can be generated as a fillable PDF and securely delivered to a client using Drake Portals.

Online Tax Research - Browse a library of tax resource websites with our custom Internet search tool.

Integrated Billing - Bill by time or form and customize the format of the client's billing statement.

Drake E-Sign

Collect electronic signatures with one of two available options:

Drake E-Sign – In Person - Use an electronic signature pad to digitally sign forms associated with an e-filed return, including the 8879, consent forms, and bank documents.

Drake E-Sign – Online - Gather client signatures remotely with Drake E-Sign – Online. Just send documents via Drake Portals for clients to sign on a mobile device or computer.

Important: To use Drake E-Sign – Online, you need to create a Drake Portals account and purchase E-Sign Events.

Drake Documents

Our document manager is a robust information hub for important tax documents, client records, and more. Produce PDF images with the integrated Drake PDF Printer, password-protect your files, preset default descriptions for scanned documents, and watermark documents as *final*, *review*, or *draft*. Here are some other time-saving features that can improve office efficiency:

- Drake Portals integration
- Integrated email launcher
- Links to external files
- Administrative tracking of file activity
- Import/export capabilities
- Customizable cabinets and folders
- Backup utility



Additional Service

GruntWorx®

Do More With Affordable Tax Automation

GruntWorx Organize LITE - Organize client tax documents into a single bookmarked and labeled PDF in a matter of minutes.

GruntWorx Organize - Provide all the features and benefits of Organize LITE with an additional layer of validation to ensure the highest level of accuracy.

GruntWorx Populate - Replace data entry by extracting information from scanned client documents and importing it directly into Drake Tax.

GruntWorx Trades - Import data from scanned consolidated brokerage statements directly into Drake Tax, saving you hours of tedious data entry.



Save **TIME**
Increase **EFFICIENCY**
Improve **PRODUCTIVITY**



Award

Document Management and Storage
2020 Readers' Choice Awards



Award

Workflow Tools
2020 Readers' Choice Awards

Tax Diagnostic Tools

Data Entry Tools

LookBack - Toggle the data-entry view to show fields that had data in them last year. A simple keystroke toggles the LookBack views, so you can verify prior-year data in even less time.

LinkBacks - Save time by tracking calculated results on the tax return back to the source within data entry.

DoubleCheck - Mark items in any text box, check box, or amount on a tax form as *verified*, *flagged for review*, or *noted for review*, leaving a green check, red flag, or yellow box, respectively. If information pertaining to a verified item changes, DoubleCheck will automatically flip the green check to a red flag.



Analysis

Data Analysis - Use the Report Manager or Multi-Office Manager (MOM) to track workflow and analyze demographics, return status, payments, billing information, and more.

Calculation Notes - Tips and alerts are generated with each return, helping you make sound decisions for your client based on their specific tax situation.

Multi-Year Comparison - Review a current-year summary side by side with the prior two years to help verify accuracy and identify possible omissions in federal and state returns.

★ **Tax Planning** - Help clients plan for the future by comparing their current tax situation to different scenarios that could occur: marriage, the birth of a child, buying or selling a house, or a change of income.

Organize Client Reports - Choose from more than 40 column headers to customize client reports in the Fixed Asset Manager.



Award

Tax Planning Systems
2020 Readers' Choice Awards

Drake Accounting®

Accounting Solutions

Drake Accounting is comprehensive accounting software that doesn't force you to choose between functionality and user experience.

If you already provide accounting services or have considered providing them to expand your business, see what Drake Accounting has to offer.

System Recommendations

Operating System - Windows 10 Pro, 64-bit
Processor - 2.0 GHz or faster multi-core processor (Intel Core i5 or equivalent)

RAM - 8 GB or more

Hard Drive - 2 GB or more of available hard drive space, plus 10–20 MB per client (actual space requirements will vary based on the type and number of clients you serve) Solid-state (SSD) hard drives can enhance system performance.

Monitor - Capable of 1920 x 1080 resolution

Internet - Internet access is required for certain features, such as e-file and software updates; high-speed Internet is recommended for optimal software performance.

Printer - Laser printer (required if submitting printed forms to the Social Security Administration)

Browser - Internet Explorer 11 or Edge browser must be installed (other browsers such as Chrome and Firefox can be installed and used as the default)

- NEW** • Bulk e-filing of Forms W-2 and W-3 to the Social Security Administration
- NEW** • Bulk tax deposit payments with the Electronic Federal Tax Payment System
- NEW** • Live posting of transactions
- NEW** • Employee portal login for pay stubs and Forms W-2
- NEW** • Optional multi-factor authentication
- NEW** • State and local minimum wage payroll calculations
- NEW** • Bulk entry for transactions
- Multi-location payroll*
- Unlimited clients
- Unlimited installs per site
- Unlimited payroll
- Batch payroll processing
- Direct deposit
- Electronic signature
- Client-facing portal
- State tax and wage forms (print and e-file)
- Edit prior-year journal entries
- Automated offsetting entries
- Intuitive tree-view navigation
- Crystal Reports® reporting engine
- Graphical drill-down reports

Awards

1099/W-2 Compliance
2020 Readers' Choice Awards

*This feature will handle payroll for companies that operate in multiple states and localities.

Client Communications

Document Manager

Drake Documents serves as the efficient communications hub of Drake Tax. From here, you can create, store, and access important forms and tax documents that can be sent directly to clients via email or a secure portal. Drake Portals integration opens up a new way to “meet” your clients where they are, whether they prefer a virtual engagement or are otherwise unable to visit your office.

Integrate Your Email Account

Use third-party email accounts from directly within Drake Tax, so you can communicate with clients without having to exit the software. Even better, you can set up user tiers—admin, office, and preparer—to maintain the workflow and security that works best for your office.

Customizable Letters & Billing

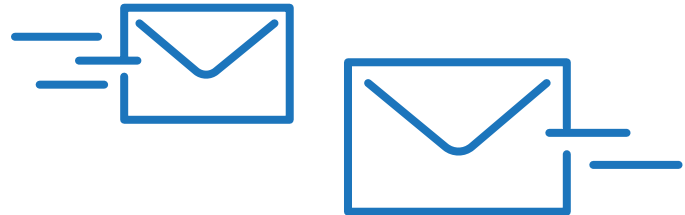
The integrated communications suite makes it easy to keep in touch with clients. Select one of our customizable letter templates, like pre-season, post-season, and result letters, or create something completely original. Drake lets you tailor the message to match the specific client situation.

Organizers

Tax data organizers save time during tax season. Drake’s organizers are completely customizable, including a breakdown of what can be added and removed, and details for each item—you can even change the checklist and questionnaire to fit the specific needs of your clients.

Drake Portals includes a customizable organizer email notification containing instructions for logging into Drake Portals and accessing the organizer download.

Drake Portals subscribers can collect information from clients using secure web-based questionnaires; some of this information can be imported into Drake Tax.



Award

Document Management and Storage
2020 Readers’ Choice Awards

Additional Service

Drake Portals

Get your own piece of the cloud for safe and convenient client file transfer. Send and receive client documents on your own secure site, anytime, anywhere.

Drake Portals is seamlessly integrated with Drake Tax, making the transition to secure online file transfer simple. All storage plans include a unique URL, brandable website, and fully customizable email templates.

Drake Portals includes a mobile-friendly Web interface that makes it easier to serve your tax clients who can't make it into the office. Here are just a few ways that Drake Portals facilitates tax preparation:

- Send and receive instant messages
- Send prior-year return summary
- Gather tax information
- Collect remote signatures
- Receive payment

Your clients are used to doing almost everything—from streaming videos to paying bills—on their mobile device. With Drake Portals, you can make tax preparation even more convenient.

Award

Client Portals
2020 Readers' Choice Awards

Drake Portals



Anytime, anywhere

Your office and clients can upload or download files at any time from any device with Internet access.



Cloud backup

Secure cloud storage lets you back up important Drake files off-site.



Get files from your client

Accelerate the return process by letting clients upload documents to your branded Drake Portals site.



Send files to your client

Upload finished tax returns and other important documents for clients to securely download at their convenience.

Business Tools

Preparer Security

Administrator Features - Control access and choose security settings on an individual or group basis.

Multi-Factor Authentication - Secure your Drake Tax account with a supported third-party multi-factor authentication service, such as Google, Amazon.com, SecurAccess, or Symantec™ VIP.

Track Workflow

Client Status Manager (CSM) - Organize and prioritize the day:

- View, search, and filter your client list
- Manage productivity with preparer tracking and reporting
- Track return details, from preparer efficiency to billing revenue
- Assign colors to return statuses to easily see your daily workload at a glance

Stay On Schedule

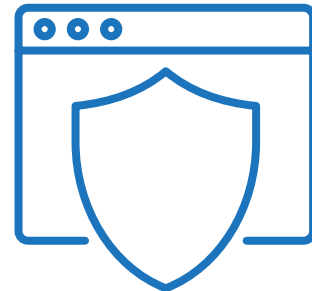
Appointment Scheduler - Schedule client appointments, send email reminders, and manage employee schedules. Color-coded appointments and the ability to synchronize with outside calendars make managing client appointments easier than ever.

Real-Time Web Reports

Track your e-filed returns with the online EF database reporting site.

Fee Collection

Accept credit and debit card payments directly in Drake Tax by enrolling with our merchant-account provider, EPS. The fully integrated Drake E-Sign feature makes accepting client signatures for payments and returns easy. And with Drake Accounting, you can set up direct deposit for clients in the Accounts Payable module.



Making the Switch

Conversions

We make it simple to convert prior-year client files from your previous software into Drake Tax.

For more information, visit DrakeSoftware.com/Products/Conversions.

Current Data Conversions

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

In-Person Training

Classroom Training - We want to make sure that you know how to use our products. To help, we offer classroom-style training sessions on both our Drake Tax and Drake Accounting programs. Choose from a variety of locations, or attend a webcast of a live session. Drake instructors will guide you through courses designed to ensure your success.

Drake Update Schools - Learn about the latest changes in tax laws and regulations and see what's new in Drake Tax by attending a one-day update school event offered at various locations around the country.



Practice Returns



Tax Courses



Webinars



Tutorials



For Classroom Training and Drake Update School dates and locations, visit Training.DrakeSoftware.com or email us at Education@DrakeSoftware.com.

Online Training & Resources

e-Training Center - Provide training and continuing education opportunities for your entire office with the tax courses, webinars, tutorials, and practice returns at **DrakeETC.com**.

Knowledge Base - Read solutions submitted by clients, programmers, support personnel, the IRS, and state tax agencies any time of day by searching our 24/7 support database at **KB.DrakeSoftware.com**.

Passport to Success - Follow our guided itinerary of important pre-tax season and software topics that keeps track of your progress at **Support.DrakeSoftware.com**.

Videos - Watch tutorials covering software setup, data entry, additional products, and more at **DrakeSoftware.com/Videos**.

Webcasts - Can't join us for a live class? Live Webcasts are available for both Drake Update Schools and Classroom Training at **Training.DrakeSoftware.com**.

Keeping You Connected

DrakeCPE®

DrakeCPE.com is an online resource for continuing education. Choose the format that best suits your learning style and schedule: self-study courses, live webinars, or on-demand webinars.

Taxing Subjects®

Read the latest tax news, download tax-prep resources, and see what your peers are up to on Taxing Subjects, Drake Software's tax blog. Whether you want to find IRS tax tips or download the newest desk reference guide, **DrakeSoftware.com/Blog** will help you get ready for tax season.

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