

# DrakeTax<sup>®</sup>



44 years providing tax and accounting solutions



An industry leader in value and consistently top-rated software



U.S.-based support focused on answering calls in seconds

## All-Inclusive Packaging and Value

For one low price, Drake Tax includes more than 6,000 federal and state forms, data conversion software for select providers, and FREE e-filing—all backed by our industry-leading customer support team.

### FEDERAL FORMS INCLUDED

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

### ALL STATES INCLUDED

Easily create multiple state returns without having to purchase additional modules. Drake also includes many of the locality and city returns across the U.S. at no additional cost.

### E-FILING INCLUDED

Drake Software helped pioneer e-filing in 1986. Today, we provide everything you need to e-file individual, partnership, business, fiduciary, and tax-exempt returns at no additional cost.

### DATA CONVERSIONS INCLUDED

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

For more information, visit [DrakeSoftware.com/Products/Conversions](https://www.drakesoftware.com/Products/Conversions).

## Support

Drake Software is known for personal and prompt customer service, even during the height of tax season. Customers get the answers they need from Drake's award-winning support team.



PHONE



KNOWLEDGE  
BASE



EMAIL



FORUMS



CHAT

### 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)



National Association of Tax Professionals  
2020 Software Survey

#1 CUSTOMER SERVICE AND TECHNICAL SUPPORT

## Productivity Tools

### DATA IMPORTS

Streamline your workflow by using timesaving features, like importing from Excel templates of 4562 assets, 8949 transactions, or our import-ready trial balance sheet. 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 the entity return to the individual's return.

### HOME SCREEN UTILITY

Start your day with a quick glance at upcoming appointments, notifications, or program updates. Review the Personal Client Manager for client information, like phone number, return status, or expected refund amount.

### FILING STATUS OPTIMIZATION

Split the return to quickly analyze the benefits of filing statuses, like comparing MFJ to MFS. Easily share a comparison worksheet with your client via paper or PDF document.

### 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.

## Business Tools

### TAX PLANNER

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

### REPORT MANAGER

Choose from more than 100 built-in reports, or use the Report Manager to quickly create your own custom report. Customize the Fixed Asset report to organize and analyze assets by category and type.

### COMMUNICATION EDITOR

Keep in touch with clients using the integrated communications suite. 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 best suit your clients.

### OFFICE SECURITY

Control access and choose security allowances for each preparer in your office. Secure your Drake Tax account with multi-factor authentication.

### ONLINE TRAINING

Coordinate your staff's software training needs with DrakeETC.com, which offers webinars, self-study courses, tutorials, and practice scenarios. Monitor progress and test scores as your staff completes these courses with our Report Card.

### ARCHIVE MANAGER

Use the Drake Archive Manager to create and save multiple versions of any return for quick comparison and safekeeping. Switch between versions with a few clicks.



## CPA Practice Advisor 2021 Readers' Choice Awards

#1 TAX PLANNING SYSTEMS

#1 TAX PREPARATION

#1 DOCUMENT MANAGEMENT & STORAGE

# Workflow Tools

## 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

**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.

## 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.

## INTEGRATED BILLING

Charge by form, item, or return with custom options. You can also set which charges appear on the invoice. Override billing, apply discounts, carry forward prior-year balances, record payments, and more.

*"Drake's customer service has built an 'expect nothing less than the best' reputation, and the various surveys of tax professionals certainly attest to that. Gotta go, I'm about to solve yet another client's tax puzzle with the best tax software of all time!"*

- TEDDY THE TAX MAN PRIOLEAU, EA

## PAPERLESS OFFICE

Work more efficiently with Drake Documents—the information hub of Drake Tax. Along with storing important tax documents and client records, our document manager has other features that help you go paperless: Produce PDF images, password-protect files, watermark documents, preset default descriptions for scanned documents, and more.

Here are a few ways you can save time and improve office efficiency with Drake Tax:

- Exchange digital client documents with the secure Drake Portals platform
- Send and receive emails with the integrated email launcher
- Access external files by clicking embedded links
- Track file activity with administrative tools
- Migrate files using the import/export feature
- Customize cabinets and folders in Drake Documents
- Preserve important office files with the backup utility

## E-SIGN

Choose the electronic-signature method that best suits your office.

**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. The fully integrated e-signature process is authentic and securely bound to the document.

**Online** - Gather client signatures remotely with Drake E-Sign - Online. They electronically sign documents on a computer or mobile device before uploading the files to Drake Portals. To use Drake E-Sign - Online, you need to create a Drake Portals account and purchase E-Sign Events.

## GIVE DRAKE TAX A TRY!

DOWNLOAD A FREE DEMO  
VISIT US AT:  
**DRAKESOFTWARE.COM**

## 2020 Tax Software Survey Journal of Accountancy

#1 OVERALL RATING

#1 EASE OF USE

#1 MOST RECOMMENDED FOR NEW PRACTICE

# DARE TO COMPARE

See how Drake's value compares to your current provider.

Features	Drake Tax	Your Current Software
Individual - 1040, 1040-NR, and 1040-SR	Included	\$ _____
Business Entities - 1065, 1120, 1120-S, 706, 709, 990, and 1041	Included	\$ _____
All State Packages	Included	\$ _____
Free e-Filing	Included	\$ _____
Organizers, Letters, Invoices	Included	\$ _____
Client Status Manager	Included	\$ _____
Drake Documents	Included	\$ _____
Drake Tax Planner	Included	\$ _____
Drake Scheduler	Included	\$ _____
Imports - 4562, 8949, K-1, and Trial Balance	Included	\$ _____
Support - Phone, Email, and Web	Included	\$ _____
Data Conversion Software	Included	\$ _____
Archived Tax Seasons	Included	\$ _____
<b>TOTAL COST:</b>	\$ _____	\$ _____

Ask us about bundling options for these workflow solutions.

**DrakePortals**

Secure client portals for document exchange

**DrakeAccounting**<sup>®</sup>

Provide bookkeeping, payroll, W-2s, 1099s, reporting, and more