

DrakeSoftware®



Professional Tax Solutions

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 a development and customer service facility in Antioch, TN. 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
550+



Business Started
1977



Customers
57,000+



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Additional Products

- 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 SecureFilePro Connect**
Client-facing portal that enables safe exchange of client files and off-site data backup

Awards

CPA Practice Advisor

2019 Readers' Choice Awards

Ranked #1

- Federal/State Income Tax Compliance
- Tax Planning Systems
- 1099/W-2 Compliance
- Client Portals
- Document Management
- Website Builders & Services
- ASP/Hosted Solution Providers

2018 Review of Drake Documents ★★★★★

2018 Review of Drake Tax ★★★★★

NATP

2018 Tax Software Survey

Ranked #1

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

AICPA/The Tax Adviser

2018 Tax Software Survey

Ranked #1

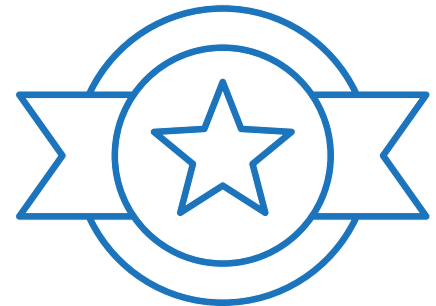
- Overall Rating
- Support
- Most Recommended for New Practice
- Price

CPA Journal

2018 Annual Survey of New York State Practitioners

Ranked #1

- Overall
- Support
- Value
- Research



Support



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

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 Connection - Internet access is required to install program updates and to use PPR software, and high-speed Internet (e.g. DSL, cable, fiber optic) can improve user experience with GruntWorx, SecureFilePro, and Google and Outlook Calendar integration

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

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)

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 Connection - Internet access (required to install program updates and to use PPR software)

Tax Solutions

Productivity

Simple Navigation - Quickly toggle between forms, schedules, and completed return 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 by using timesaving features, like importing unlimited Form 4562 assets and Schedule D transactions from Microsoft® Excel into Drake Tax, entering data from our import-ready trial balance sheet, and importing and exporting K-1 information.

Go Paperless - With the Drake PDF Printer, you can seamlessly print the tax return to a PDF file, encrypt it with a password, and store it 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, quickly 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-NR
- 1041
- 1065
- 1120
- 1120-S
- 1120-H
- 4720
- 5471
- 1118
- 3115
- 706
- 709
- 990
- 990-PF
- All States

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 SecureFilePro.

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.

e-Sign - 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, tamper proof, and securely bound to the document.

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; watermark documents as final, review, or draft; and preset default descriptions for scanned documents. Here are some other time-saving features that can improve office efficiency:

- SecureFilePro 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 Accurate Tax Automation

GruntWorx Organize LITE - Organizes your client's shoebox of tax documents into a single bookmarked and labeled PDF in a matter of minutes.

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

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

GruntWorx Trades - Imports data from scanned consolidated brokerage statements directly into Drake Tax, saving you hours of tedious data entry when you need those trade details.



Award

2019 Review of Drake Documents ★★★★★
CPA Practice Advisor



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

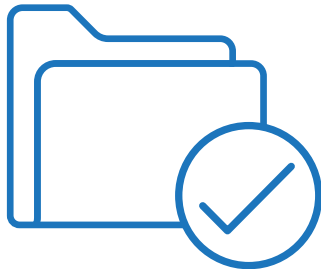
Tax Diagnostic Tools

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 data and statistics on 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 - With the Fixed Asset Manager, you can choose from more than 40 column headers to customize client reports.



Award

2019 Award Winning Tax Planning
CPA Practice Advisor



Additional Service

Drake Accounting®

Accounting Solutions

Drake Accounting is comprehensive accounting software that was built from the ground up using the latest computer technology. Our core design philosophy? You shouldn't have to choose between functionality and user experience.

If you already provide accounting services or have considered providing them to expand your business, we invite you to explore what Drake Accounting has to offer:

- 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

Minimum System Requirements

Processor - 1 GHz (Intel Core i3 or equivalent)

RAM - 4 GB

Hard Drive - 1 GB of available space, plus 10–20 MB per client

Monitor - capable of 1024 x 768 screen resolution

Internet Connection - Internet access (required to install program)

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



Client Communications

Customize and produce professional client letters with the integrated communications suite.

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 SecureFilePro™ portals. SecureFilePro integration means convenient access to site settings, employee and client lists, reports, and Guest Exchange.

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 instructions for using organizers in your practice, 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.

SecureFilePro (SFP) subscribers can distribute fillable PDF organizers to clients to be electronically filled and returned using the secure portal. SecureFilePro also includes a customizable organizer email notification containing instructions for logging into SFP and accessing the organizer download.





Additional Service

SecureFilePro (SFP)

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.

The SecureFilePro portal 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.

SecureFilePro Connect

SecureFilePro Connect includes a mobile-friendly Web application that makes it easier to serve your tax clients who can't make it into the office. Here are just a few ways that SFP Connect 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 video to paying bills—on their mobile device. With SFP Connect, you can make tax preparation even more convenient.



Award

2019 Readers' Choice Award

CPA Practice Advisor



SecureFilePro™



Anytime, anywhere

You and your clients can upload or download files at any time, from any device with Internet access.



Cloud backup

In addition to securely transmitting and receiving files from clients, SecureFilePro functions as a secure off-site backup. Now you can safely back up your important Drake files in the cloud.



Get files from your client

Your client uploads documents to your branded SecureFilePro site: less waiting for you, a quicker return process for your client.



Send files to your client

You upload your client's finished tax return and other documents. Your client signs in and downloads whenever it's convenient.

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, like Google, Amazon.com, SecurAccess, or Semantec 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.





Additional Service

Drake Hosted

Cloud-Based Hosting

Drake Hosted is a cloud-based application hosting service, supporting Drake Tax, Drake Accounting, and our document manager, Drake Documents. For an additional fee, we can also host Microsoft Office® programs. Backed by industry-standard SSL-based encryption and enterprise-level firewall and antivirus protection, Drake Hosted provides convenience and security for tax professionals who desire the flexibility of the cloud.



Flexibility

Accessible from anywhere, anytime



Performance

Latest hardware and software



Security

Monitoring and industry-standard encryption



Support

Award-winning customer service



Award

2019 Readers' Choice Award
CPA Practice Advisor

Making the Switch

Conversions

Our conversion program makes it simple to convert prior-year client files from your previous software into Drake Tax.

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

Current Data Conversions

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

In-Person Training

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

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.



Practice Returns



Tax Courses



Webinars



Tutorials



For Classroom Training and update school dates and locations, visit [Training.DrakeSoftware.com](https://www.drakesoftware.com/Training) or email us at Education@DrakeSoftware.com.

Online Training & Resources

e-Training Center - Provide training and CPE 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 departments of revenue 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 a resource for online 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.

