DrakeTax®

46 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

Great Value

Drake Tax offers multiple package options that 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 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™ → 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, 1041, 1065, 1120, 1120-S
TaxSlayer Pro® → 1040
TaxWise® → 1040, 1041, 1065, 1120, 1120-S
TurboTax® → 1040
UltraTax® → 1040, 1041, 1065, 1120, 1120-S

For more information, visit **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)

CPA Practice Advisor 2023 Readers' Choice Awards

#1 TAX PLANNING SYSTEMS
#1 TAX PREPARATION SOFTWARE
#1 DOCUMENT MANAGEMENT & STORAGE

Productivity Tools

SIMPLE NAVIGATION

Quickly move between forms, schedules, and the completed return with toolbar clicks or shortcut keys.

FLEXIBLE DATA ENTRY

Utilize our menu, search, or forms navigation to quickly access your data entry screen. Simplify data entry and reduce keystrokes with macros and keyboard shortcuts.

IMPORT AND TRANSFER DATA

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 appropriate return.

INTERACTIVE HOME SCREEN

Start your day with a quick glance at upcoming appointments, notifications, or update statuses. Scan the Personal Client Manager for client details, like return status, expected refund amount, or contact info.

ARCHIVE MANAGER

Use the Drake Archive Manager to create multiple versions of any return for comparison and safekeeping. Revert back to any version with just a click. Helpful for testing returns for different scenarios.

MULTISTATE RETURNS

Easily create any state return you need without having to buy a state add-on module.

GO PAPERLESS

With the Drake PDF printer, you can seamlessly print the tax return to a PDF file, protect it with a password, bookmark it, and store it in the document manager, Drake Documents.

2022 Journal of Accountancy Survey

HIGHEST OVERALL RATING

CLIENT ORGANIZERS

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

DOCUMENT MANAGEMENT

Create, organize, and find documents, without ever needing a paper copy. Drake Documents is an electronic filing cabinet for client tax documents, records, and returns. It greatly reduces paper handling and storage needs for paper documents.

CLIENT MANAGEMENT

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.

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.

CLIENT COMMUNICATIONS

Keep in touch with clients using integrated communications tools. 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.

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.

Tools for Accuracy

DIAGNOSTICS

EF Messages - Drake will alert you to potential IRS reject issues with detailed explanations and interactive messages.

Calculation Notes - Troubleshoot potential issues for your client with the preparer notes that are conveniently generated with each return.

FLAGGED FIELDS

Force important data to be verified. Flag as you go or set flagged fields globally. Use it to verify critical data when updating from the prior year.

PROTECTION PLUS

Protection Plus saves tax professionals time by helping resolve client letters, notices, and audits. They also provide identity theft restoration services and business insurance.

RETURN REVIEW

LookBack - Toggle the data-entry view to show fields that had data last year. A simple keystroke toggles the LookBack views, so you can view 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.

"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

OPTIMIZE FILING STATUS

Split the return to quickly analyze the benefits of married filing jointly (MFJ) versus married filing separately (MFS) for your client. Share the MFJ/MFS comparison report with the taxpayer via paper or PDF document.

DATA SECURITY

Control access and choose security allowances for each preparer in your office. Secure Drake Tax with multifactor authentication.

NOTE SCREENS

Add a note for a form, or for the return. Use to remind yourself, inform other staff, or hold a return from filing until an issue is resolved.

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.

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. Self employment comparison available as well.

QUICK CALCULATION RESULTS

Display return info at a glance, including interactive messages, preparer notes, fees, refund or balance-due amounts, and e-file status—all with one keystroke.

WORKSHEETS

Provide supporting documentation for calculation details with worksheets generated within the software.

2022 CPA Journal Survey of NY State Practitioners

#1 VALUE FOR COST
#1 CUSTOMER SUPPORT
#1 AVAILABILITY OF FORMS

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	$__________
Additional Integrations - Accounting, Cloud Hosting, Client Portals, Research	$__________	$__________
TOTAL COST:	$__________	$__________

Onboarding & Training

Our dedicated team will provide you with training resources carefully designed to ensure a smooth transition to Drake. Count on us to guide you through onboarding with **live webcasts, training videos, conversion guidance**, and interactive, **virtual Q&A sessions**.

Download a free trial at Info.DrakeSoftware.com/Free-Trial