

Drake 201 - Classroom Training

Course Description: Learn more about tax preparation in Drake Tax during this 2-day course (16 hr.) that dives deeper into various taxpayer scenarios, best practices, and tips. After the course, attendees will be able to:

- Perform data entry for all necessary forms and activities, including: Schedule C, Schedule E, Investment activity, Foreign asset reporting and Sales of assets.
- Review K-1 reporting and basis.
- Prepare and present Tax Planner scenarios.
- Prepare miscellaneous forms including the FAFSA worksheet.
- Prepare extensions and amended returns.
- Handle deceased taxpayer situations.
- Review available reports and how to customize reports.
- Perform basic business return data entry, Trial Balance Import, K-1 Export.

Course Fee: \$419. Register 30 days prior to the date of the course and receive a 5% discount.

How to Register: Sign in to <https://Support.DrakeSoftware.com> and select **Training > Classroom Training** from the menu on the left side of the web page. Refer to the **FAQs** on the web page for detailed instructions and frequently asked questions.

CPE Facts:

Affiliation	Format	CPE/Field of Study	Course ID #	Sponsor ID #
NASBA	Group - Live	16 — Taxes	N/A	103137
CTEC**	N/A	0 — N/A	N/A	3038
IRS	In Person	16 — Federal Tax Law	FQTGU-T-00544-23-I	FQTGU
TX State Board of Accountancy	Group - Live	16 — Taxes	100380	002921

*Individuals with other professional credentials should check with their state licensing board or accrediting organization to determine if this program meets their continuing education requirements.

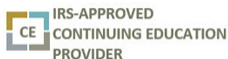
**CTEC does not allow credit to be awarded for courses that cover tax/accounting software topics.

Course Level: Basic

Last Revision: Summer 2023

Prerequisites: None

Course Policies: Refund requests must be sent in writing to the Drake Software Education Department via mail, fax, or email. Refunds will not be granted by phone. Drake will make a full refund for any request received 10 business days before scheduled start of training. Any cancellation received 5-9 business days prior to the start will receive 50% refund. No refunds on cancellations less than 5 days before the scheduled start of the training. For more information regarding refund policy, administrative policies, and complaint resolution, please contact our office at 828-524-8020 or email Education@DrakeSoftware.com.



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