



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



e-File Stats
25+ million federal and state accepted returns



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New

- 7** **Drake Accounting**
Drake Software's accounting and payroll application.
- 9** **SecureFilePro Connect**
A mobile-friendly Web application that makes it easier to serve your tax clients who can't make it into the office.

Awards

CPA Practice Advisor

2018 Readers' Choice Awards

Ranked #1

- Federal/State Income Tax Compliance
- Tax Planning Systems
- 1099/W-2 Compliance
- Client Portals
- Document Management and Document Storage
- Website Builders and Services for Accounting Firms
- ASP/Hosted Solution Providers
- Payroll

NATP

2017 Tax Software Survey

Ranked #1

- Overall Satisfaction
- Customer Support
- Technical Support
- Reliability
- Price
- Updates after Federal Tax Updates

AICPA/The Tax Adviser

2017 Tax Software Survey

Ranked #1

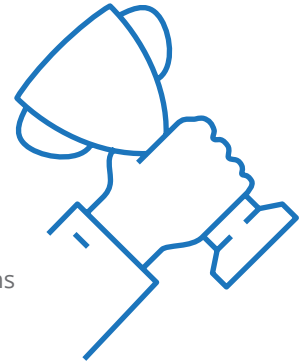
- Overall Rating
- Support
- Ease of Updates and Installation
- Ease of Use
- Handling Updates during Tax Season
- Handling Data Transfers within Returns
- Ease of Electronic Filing
- Handling Multistate Business Returns
- Conversions
- Most Recommended for New Practice
- Price

CPA Journal

2017 Annual Survey of New York State Practitioners

Ranked #1

- Overall
- Customer Support
- Ease of Use
- Value for Cost and Customer Support



Just want to let you all know that your support is the most awesome service ever! I love that when I call I always get a live person who knows their way around the software. Fantastic job!

Misty, Valued Customer Since 2016

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 7, 8, 10
- Windows Server 2008, 2012, 2016

All operating systems are expected to be up to date, with the latest service pack or updates installed.



Awards

2017 Customer Support Awards

NATP 2017 Tax Software Survey

AICPA/The Tax Adviser 2017 Tax Software Survey

CPA Journal

Network Capabilities

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

Minimum System Requirements

- 1 GHz processor
- 1 GB of RAM for 32-bit and 2 GB of RAM for 64-bit
- 2 GB of available hard drive space
- Monitor capable of 1024 x 768 screen resolution
- CD drive (required for CD service)
- Printer that supports Windows GDI (Graphical Device Interface) or HP-compatible laser printer
- Internet Explorer 11 or Microsoft Edge web browser must be installed, however, other browsers such as Chrome and Firefox® can also be installed and set as the default
- Internet access (required for program updates and PPR software)

These are the minimum requirements to run Drake Tax on most systems. For superior performance, we recommend system upgrades above the stated minimums. Actual requirements may vary based on your system configuration and the features and other programs you install.

Recommended System Requirements

- Windows 10 Professional 64-bit
- 2.0 GHz processor or faster
- 4 GB RAM or more
- Monitor capable of 1920 x 1080 screen resolution
- High-speed Internet access (recommended for GruntWorx, SecureFilePro™, Google, and Outlook Calendar integration)
- TWAIN-compliant scanner (req'd for Drake Documents)

Tax Solutions

Productivity

Simple Navigation - Quickly toggle between forms, schedules, and the completed return with clicks or hotkeys.

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 Excel into Drake Tax, entering data from our import-ready trial balance sheet, exporting parents' tax information directly to the child's Form 8615, and importing and exporting all 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
- 1040NR
- 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 using Compare Report and the Tax Planner.

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 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
- Link to external files
- Administrative tracking of file activity
- Import/export capabilities
- Customizable cabinets and folders
- Backup utility



Award

2018 Award Winning Document Management
CPA Practice Advisor



I would like to thank Drake for being so easy to use. When the threat of Hurricane Irma forced me to close up shop and evacuate, I could download all data and be up and running via laptop within an hour's time—with all my data intact!

Marc, Valued Customer Since 2014



Additional Service

GruntWorx®

Tax Automation and Organization

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, all in about an hour.

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.

Stop organizing and entering client data by hand.



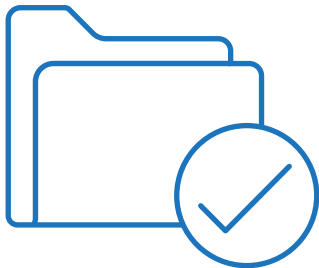
Tax Diagnostic Tools

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 with our new diagnostic tool by tracking calculated results on the tax return back to the source data.

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.

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

2018 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:

- 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



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 an integrated email or SecureFilePro™ portals.

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) - 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.

NEW 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.



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

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

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

Stay On Schedule

Appointment Scheduler - Schedule client appointments, send email reminders, and manage employee schedules.

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.

Mobile App

Download the Drake Mobile App to keep up to date on the status of your e-filed returns while on the go—available for iOS and Android phones and tablets.



I switched to Drake Tax a couple years ago, and I am very happy I did. I left my previous software provider because the price was so extremely high. Drake not only beat them in price, but the customer service is outstanding—I actually get to talk with real people when I call! Now, I'm a loyal Drake user.

Gail, Valued Customer Since 2015



Additional Service

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



When we decided to purchase Drake Hosted and SecureFilePro, it really turned out to be a blessing. The person who assisted me basically took me by the hand, was courteous, extremely knowledgeable, and very patient with me. Business owners expect that out of our employees, but you hardly ever get it from customer support. We always get that level of service at Drake.

Jose, Valued Customer Since 2011

Drake Hosted

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, 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



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

Passport to Success - Prepare for tax season and earn a special certificate by following our itinerary of important tax and software topics. We keep track of your progress by stamping your passport along the way. Passport to Success is available at [Support.DrakeSoftware.com](https://www.drakesoftware.com/Support).

Multi-Media Help System - Search for feature-specific help and step-by-step instruction with our integrated Drake Help System. Help videos are also accessible from within Drake Tax.

User's Manual and Evaluation Guide - Access the manual as a PDF file on your Drake Software® CD, from within the tax software, or online at [Support.DrakeSoftware.com](https://www.drakesoftware.com/Support). Use the evaluation guide to learn about navigation, setup, and e-filing, and earn CPE by completing walkthroughs.

e-Training Center - DrakeETC.com - DrakeETC is an online resource designed to give you control of your staff's software training needs, offering webinars, self-study courses, tutorials, and practice scenarios. With your administrator login, you can monitor progress and test scores for your staff with our Report Card reporting system.

In-Person Training

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 - Drake Tax has many features and tools to assist you as a tax professional. Join us for classroom training at a location near you or at the Drake Education Center, located in Drake's hometown, Franklin, NC. Spanish sessions or bilingual assistance are available in some locations. Here's what to expect at Drake 101 sessions:

- **Day 1: Setup and Tools** - From the ins and outs of software installation to implementation of specialized efficiency tools, learn how to get Drake Tax up and running.
- **Day 2: Return Prep and e-Filing** - In this introduction to return preparation in Drake, instructors guide participants through a hands-on, interactive workshop.
- **Day 3: Workflow Solutions** - Discover the Drake features designed to increase office efficiency, including document management, client portals, and tax preparation automation.



Practice Returns



Tax Courses



Webinars



Tutorials

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^(S)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, **TaxingSubjects.com** will help you get ready for tax season.

