

The Professional Tax Solution



Always Exceptional

CPA Practice Advisor

2012 Readers' Choice Awards

- #1 Federal/State Income Tax Compliance
- #1 Tax Planning
- #1 Website Builders
- #1 Document Management/Storage
- #1 Other Workflow Tools

2011 Review Document Storage Systems

- Overall Rating: ★★★★★¹/₂
- Core Product Function/Features: ★★★★★³/₄
- Integration: ★★★★★¹/₂

NATP National Association of Tax Professionals

2011 Sorting Out Software Survey

- #1 Overall Customer Satisfaction
- #1 Customer Service
- #1 Ease of Installation
- #1 Conversion
- #1 Price
- #1 Customer Loyalty

2011 Review Tax Compliance Systems

- Overall Rating: ★★★★★¹/₂
- Core Functionality: ★★★★★³/₄
- Document Manager: ★★★★★³/₄
- Integration: ★★★★★¹/₄
- Help/Support: ★★★★★

2011 Rating Traditional Workflow Systems

- Overall Rating: ★★★★★¹/₂
- Help/Support: ★★★★★¹/₂
- Core Functionality: ★★★★★¹/₂
- Integration: ★★★★★¹/₂

Journal of Accountancy

2011 Tax Software Survey

- #1 Overall Value
- #1 Ease of Installation/Update
- #1 Ease of Use
- #1 Ease of Paperless Electronic Filing
- #1 Customer Loyalty

Training

Evaluation Guide > This guide introduces you to navigation, setup, and e-filing. It walks you through preparing 1040, 1120, and 1065 returns within the software. You also earn FREE CPE credits just for completing the evaluation guide.

e-Training Center (ETC) > Use ETC as a resource to train your entire office! Earn CPE quickly and easily online by signing up for a webinar. Choose from several tax and software related topics. ETC also offers interactive tax courses on a variety of topics, from basic 1040 preparation to preparing corporation and partnership returns – all with the option of earning CPE credit. Use practice returns to familiarize yourself with Drake data entry, and view tutorials that teach the basics of the software. Both student and administrator can view the student's progress using our handy report card feature. Visit **www.DrakeETC.com** for more information.

Drake Passport to Success > Our Passport to Success will help you get ready for a great tax season with Drake Software. Follow our itinerary of important tax and software topics to explore before tax season, and we'll keep track of your progress by stamping your Passport along the way. At the end of your journey, you will receive a special certificate. Passport to Success is available at **www.Support.DrakeSoftware.com**.

Interactive Tutorials > Tutorials introduce the basics of the software, including setup, navigation, and e-filing.

Live Training > New customers can look forward to a wide array of live training options, from online webinars to traditional classroom instruction. We offer courses across the United States and in Franklin, NC – the home of Drake Software.

For dates and locations, visit the Training menu at **www.Support.DrakeSoftware.com**.

Update Schools > Each fall, Drake Software hosts Update Schools at various locations across the United States. These schools review the latest tax law changes, present new software enhancements, and provide the opportunity to earn CPE credit while networking with other tax preparers. For dates and locations, see the Training menu at **www.Support.DrakeSoftware.com**.

Drake Software User's Manual > *The Drake Software User's Manual* is a comprehensive resource for all your software questions. You can access the manual as a PDF file on your Drake CD, from within Drake Software, or online at **www.Support.DrakeSoftware.com**. In addition, a paper *Drake Software User's Manual* is available for purchase.

Drake Help System > Access the Drake help system from within the tax software. This resource includes screen-specific information and steps for completing procedures in the program. The help system is user-friendly, with three different ways to access data: by topic, by index, or by keyword search. From within data entry, you can access field-specific help, screen help, and FAQs for all federal and state packages.

Fast & Easy

Electronic Filing

As the leader in electronic filing for more than 25 years, Drake Software knows how important speed and reliability are to you. We have both the experience and expertise to ensure your files are secure. We've been part of e-filing since its inception in 1986, and our processing center is the most reliable in the industry.

Drake provides everything you need to e-file federal and state individual, business, fiduciary, nonprofit organization, and estate returns. Our secure servers process your e-filed returns and route them to the proper IRS service centers and the appropriate states.

PDF Attachments

In Drake, it's easy to attach PDF files to your business returns for e-filing. Once you're done, the documents can be stored in the Drake Document Manager for future reference. PDF documents can be e-filed with forms 1120, 1120S, 1065, and 990.

Last Year, Drake Software Seamlessly Processed
*More than 19 Million Federal &
State Accepted Returns*

"Drake Software is the best tax software! It was a great tax season for my company. Thanks for all the help and support, and for the best tools for success."

Salazar > Valued Drake Customer for 3 Years

Providing the Best Support ... Hands Down!

With Drake, you can expect personal and prompt service – no matter what time of year. On average, our customers wait less than nine seconds during peak season to speak with a customer support representative. You can depend on our staff of dedicated support personnel, who have direct access to software programmers, to promptly give you the answers you need. Spanish support is also available.

Knowledge Base

Access the most current support and product information 24/7. Drake constantly updates and enhances the Knowledge Base so you can troubleshoot or find answers to specific questions. You can even customize your search based on keyword, category, subcategory, and year. Access the Knowledge Base by clicking the “Support” shortcut key in the software or by logging on to www.Support.DrakeSoftware.com.

Broadcast E-mail

Broadcast e-mails, sent to your Drake-provided e-mail account, notify you of important information about that latest industry news and Drake-related updates.

Online Tax Research

Online tax research is also included when you purchase Drake Software. This resource includes quick references and tools to get the answers you need, when you need them.

Drake Software Forums

Online forums, moderated by Drake representatives, provide opportunities for Drake customers to post messages about everything from business strategies and software questions to the latest tax news and software suggestions.

Forum	Last Post	Threads	Posts
Drake Software General Board			
News & Information Read the latest here	Drake 2010 - Free Tools by DavidStess 09-09-2010 10:46 PM	108	659
State News & Information Read the latest here	New Jersey 1099-G's by DavidStess Today 10:34 AM	80	312
Suggestions (1 Viewing) Share your suggestions not related to our state software programs here.	Depreciation by m00s1e Today 12:55 PM	1,230	9,490

“Tonight, I called technical support and got a real person on the second ring. Five minutes later, when I hung up the phone, my husband looked at me with a shocked expression and asked, ‘Was that your new software company?’ Thanks for the great support!”

Jessica > NEW Valued Drake Software Customer

Compare & Review

Return Diagnostics

EF Messages are produced when a return has an issue that would cause an IRS rejection. Each message, which consists of the error code and a brief description of the issue, must be cleared before a return can be e-filed.

Notes are generated automatically to provide reminders and tips about each tax return.

Tax Year Comparison

Quickly compare and analyze a client's data from multiple tax years with our convenient comparison worksheet.

Interactive Diagnostics

The Calculation Results window displays return information—including notes, fees, refund amount, and e-file eligibility - at a glance. If a return is not eligible for e-file, a simple click can take you directly to the problem form and field.

Archive Manager

Use the Archive Manager to save a return before amending it, or to compare multiple versions of a return so you can make the best recommendation to your client.

Drake 2011 - Calculation Results - (400-00-1004 - Phlox, Sara)

Summary | Details

	Total Income	Taxable Income	Total Tax	Refund	Balance Due	Payment Method	Eligible For EF
Federal	38,111	18,511	2,171	5,777	0	Receive Check	✓
VA760	38,111	28,321	1,371	4,029	0	Receive Check	✗

EF Messages - Double click on any highlighted item in the list below to fix the problem:

Package	Code	Description - (right-click for full description)
VA	307	VA Electronic Filing NOT allowed...

Return Notes:

You have answered a question on the 8867 screen that has disallowed EIC
 VA Low Income Calculation NOT Allowed: Family AGI = \$38,111 Poverty Guideline = \$18,530

Fee Type	Amount
Preparation Fee	\$0.00

DCN: 00-777777-01004-2

Total Tax Refund: 9,806

Current Program: Calculation Complete **Eligible For E.F.**

Description: Press <ENTER> key or Click Here to Continue Continue

Drake 2011 - Client Status Manager



Open



Search



Customize



Refresh



Filters



Quick View



Reports



Export



Help



Exit

ID Number	Client Name	Type	Preparer	Status	Started	Compl
400002003	BEACH, PETER & SUSAN	1040	Christine Reynolds	EF Accepted	01/12/2012	
400002001	CLARK, BOB	1040	Lori Correa	EF Rejected	03/13/2012	
400002007	GEADELLI, NEAL	1040	Fernando Alvarado	In Progress	02/11/2012	
400002006	GREENE, GARY	1040	Christine Reynolds	EF Pending	03/13/2012	
400002008	HOLDEN, DAVID & MARGARET	1040	Barbara Cook	Complete	03/13/2012	03/13
400002004	SAMUALSON, MICHAEL & ELIZABE...	1040	Fernando Alvarado	In Progress	01/14/2012	
400002005	WESTWOOD, THOMAS & TERRI	1040	Fernando Alvarado	In Progress	03/13/2012	

No Selection (7 Total Unfiltered Records)

Keeping You Organized & Efficient

Software Customization

Setup Options > Tailor the software to suit your office needs. From what forms are generated with a tax return to the electronic filing process, the software offers a large amount of flexibility. Many of the global options can be overridden on a per-return basis in data entry.

Preparer Security > Assigning security settings to preparers in your office is easy. Choose from pre-defined security settings or customize the level of access a preparer receives. Assign security individually or to an entire group. The process is flexible and convenient, and it gives you control over the software and those who use it.

Client Status Manager (CSM)

- > Search, view, and organize client files
- > Follow workflow and manage productivity with on-screen tracking and reporting
- > Track return details, from preparer efficiency to billing revenue, and even real-time accounts receivable
- > Narrow your view using filters

Interactive Home Window > The **Home** window features the Personal Client Manager (PCM), a condensed version of the CSM. The PCM displays returns for the logged-in preparer, which helps to organize and prioritize the day.

The **Notes** portion of the **Home** window acts as your electronic notepad. The **Appointments** portion displays your daily appointment schedule, while the **Notifications** section apprises you of e-mails to download, acknowledgements to process, or available updates to install. The **Home** window also allows you to hide all client-related data with the click of a button.

“Drake Software allows me to enter client information faster and with greater accuracy. Thanks to Drake, I can offer yearly comparisons, e-mail attachments, and bank products that meet my client’s banking needs.”

Francina > Valued Drake Customer for 4 Years

Customized Letters

Keep in touch with your clients with more than 40 prewritten letters that you can edit to suit your clients' needs. The Client Communications Editor allows you to fully customize or write a letter using keywords and conditional paragraphs, font choices, letterhead options, and other features to enhance and personalize your client communications.

Appointment Scheduler

Create and manage preparer schedules and appointments in the Scheduler. The Scheduler can be launched in either Preparer Mode or Front Office Mode (designed for office personnel who create and manage appointments but don't need access to the full Drake program).

Proformas & Organizers

Proformas and organizers are valuable preseason tools that help save time during the rush of tax season. Organizers, which can be e-mailed securely as PDF files, help your clients collect their records and prepare for their appointments. Use proformas to guide you through client interviews and make data entry quicker and easier. Both proformas and organizers include the previous year's tax information.

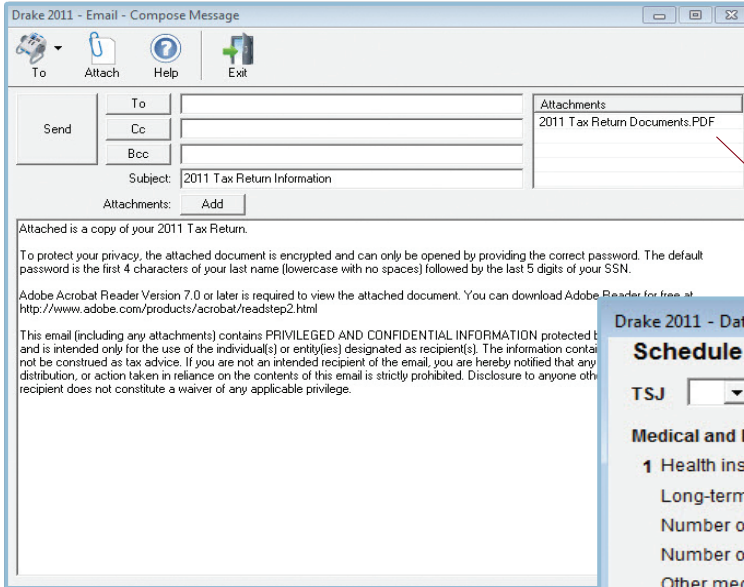
Drake 2011 - Appointment Scheduler

Current Calendar Date: 02-01-2012

Calendar for 02-01-2012 | Weekly Calendar | **Preparer Calendars**

Time	Nancy	barbara	reynolds	Lori	Davi
6:15 AM					
6:30 AM					
6:45 AM					
7:00 AM					
7:15 AM					
7:30 AM					
7:45 AM					
8:00 AM					
8:15 AM					
8:30 AM	Rachel Peony				
8:45 AM	...Continued			Sara Phlox	
9:00 AM	...Continued	Sue Magnolia		...Continued	
9:15 AM	...Continued	...Continued			
9:30 AM		...Continued			
9:45 AM					
10:00 AM					
10:15 AM			Romeo Mari...		
10:30 AM			...Continued		
10:45 AM					
11:00 AM					
11:15 AM					
11:30 AM					
11:45 AM					
12:00 PM					
12:15 PM					

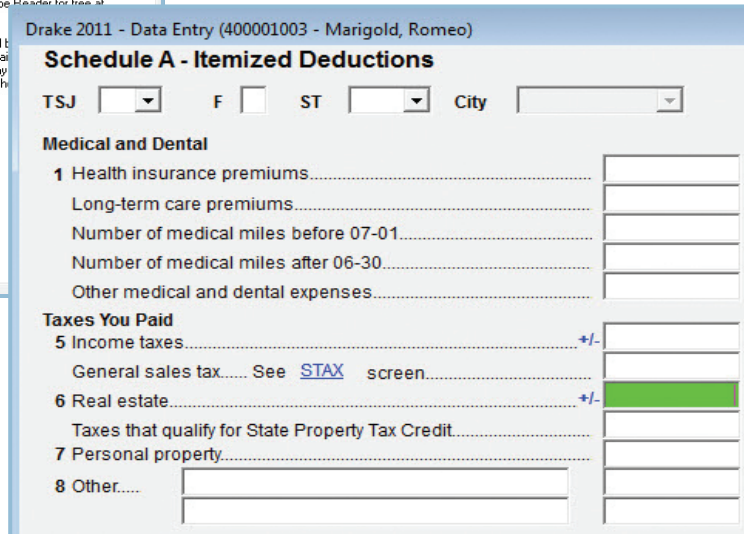
Today: 2/1/2012



PDF Printer

With the Drake PDF printer, you can password-protect PDF copies of tax returns. From data entry, you can print an electronic copy of any return to the Drake Document Manager.

You can even e-mail a client directly from inside a tax return and, with one click, attach an encrypted PDF copy of the return.



Flagged Fields

Flagged fields help prevent mistakes, as they force you to verify important data-entry fields before finalizing the return. Flag fields as you go, or set flags globally for all new returns. Flagged fields help prevent mistakes and allow you to remain in control of the return and your progress.

Reporting

Client, EF, and Scheduler Reports > Operate your practice more efficiently with reports. With Drake's Report Manager, you can view and print reports on data entry statistics, return statuses, e-filing information, preparer appointments, and much more.

Real-Time Web Reports > Use the online electronic filing (EF) database to track e-filed returns quickly and easily from anywhere with an Internet connection. See which returns have been accepted or rejected by the IRS and state, and monitor the status of bank products. You can even check the status of your preparer fees online. If you have multiple offices, view a snapshot of your entire business by running various reports in the Multi-Office Manager (MOM).

EF data is updated continuously as we process new information about your returns. You can convert these reports to Microsoft Access® or Excel® files.

New Returns by Ack Date Summary

Records Returned: 4

Page: 1

Lines per Page: 20

[Download](#)

EFIN	Total Returns	Rjctd	Pending	Acptd	Pct Acptd	Bank Total	Bank Pct Acptd	Prep Total	Prep Accts Paid	Prep Avg Fee	Prep Dpstd	Prep Pending	Prep Acptd Pending Total	Prep Acptd to Pending
777771	794	0	0	794	100.00	748	94.21	\$71,352.00	729	\$95.39	\$69,742.00	\$0.00	\$71,352.00	97.19
777776	506	0	0	506	100.00	479	94.66	\$46,747.00	463	\$97.59	\$45,757.00	\$0.00	\$46,747.00	97.70
777777	766	2	8	756	98.69	732	96.83	\$71,937.00	713	\$98.27	\$70,442.00	\$832.00	\$72,769.00	97.13
777778	779	0	32	747	95.89	654	87.55	\$65,143.00	640	\$99.61	\$64,213.00	\$2,772.00	\$67,915.00	98.17
TOTALS	2845	2	40	2803		2613		\$255,179.00	2545		\$250,154.00	\$3,604.00	\$258,783.00	390.19

Report created on 2/11/2011 10:33:27 AM

Page 1 of 1

Download 

Print

Records Returned:27

Page: 1 2

Lines per Page:

20 

Preparer	Filing Status	Extension	Type	Started	Completed	Last Change	Changed By	Status	Refund	Bank Deposits	Bank Deposit Date	Client Payments	Client Payment Date	Total Bill
JOHN		0	Individual (1040)	01-01-1920	01-01-1920	01-09-2012	ADMIN	Updated From Last Year	\$0.00	\$0.00		\$0.00		\$0.00
RON		0	Sub-S (1120S)	01-01-1920	01-01-1920	02-14-2012	ADMIN	Updated From Last Year	\$0.00	\$0.00		\$0.00		\$0.00
MARY		0	Individual (1040)	01-13-2012	01-13-2012	01-13-2012	ADMIN	New Client	\$0.00	\$0.00		\$0.00		\$0.00
ADMIN	2	0	Individual (1040)	02-27-2012	02-27-2012	02-27-2012	ADMIN	In Progress	\$0.00	\$0.00		\$0.00		\$115.00
ADMIN	2	0	Individual (1040)	01-12-2012	01-12-2012	02-13-2012	ADMIN	In Progress	\$126.00	\$0.00		\$0.00		\$0.00
ADMIN		0	Sub-S (1120S)	03-05-2012	03-05-2012	03-05-2012	ADMIN	In Progress	\$0.00	\$0.00		\$0.00		\$0.00
ADMIN	4	0	Individual (1040)	02-05-2012	02-05-2012	02-09-2012	ADMIN		\$1,268.00	\$0.00		\$0.00		\$180.00

Multi-Office Manager (MOM) > Combining information on paper-filed or e-filed returns from multiple offices, allowing you to track all of your offices with one simple-to-use interface. This tool works via the Internet and with the Client Status Manager, sending electronic transmissions to Drake and saving all your offices' information in one database.

Drake Document Manager

File Setup Documents Help

New Folder File Backup Copy.. Cut Paste Import Link File Scan Email Drag Help Exit

Enter search text... Find

Document Name	Type	Last Modified	Description	Status
2011 1040	pdf File	3-24-2012 15:43:07		
2011 Tax Return Documents	pdf File	3-24-2012 15:43:20	Right click to ent..	
2011w2	pdf File	1-12-2012 18:07:26	Right click to ent..	
f1098e	pdf File	1-27-2012 15:17:48	Right click to ent..	

Update status: Up to date

It's Time to Get Organized

PAPER: Why print it, file it, forget it, lose it, find it, and then shred it?

The Drake Document Manager (DDM) is the perfect tool for organizing and storing documents, and Drake makes it simple to get started. The DDM is fully integrated with Drake Software. Quickly create folders for each client and customize the folders to fit your practice. Print return documents to PDF and save them automatically in the DDM where you will always have the tax return at your fingertips.

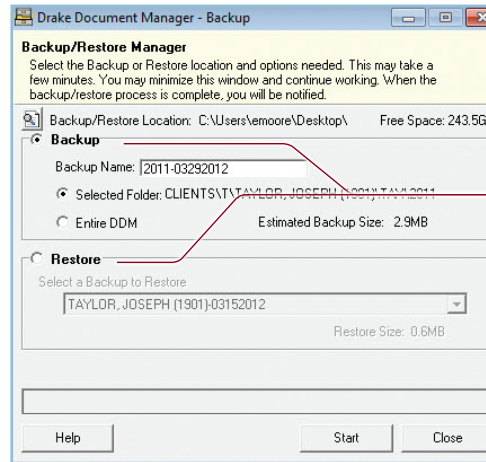
You can also send documents to your printer and to the DDM simultaneously, so you have an electronic copy of what was handed to your client...all in one easy step! Scan all your source documents into organized and easy-to-find client files with the system. The DDM is fully compatible with TWAIN compliant scanners. You may also save any electronic document, from any software, directly to the DDM.

Other Time-Saving Features Include:

- > e-Mail documents directly from the DDM.
- > Link to files not stored in the DDM.
- > Password protect any file stored in the DDM.
- > Track when files were created, opened, or revised.
- > Easily move files with Import/Export.
- > Customize the file structures to fit your practice.
- > Create backups and automatically update the DDM.

Handling your Important Documents with the DDM

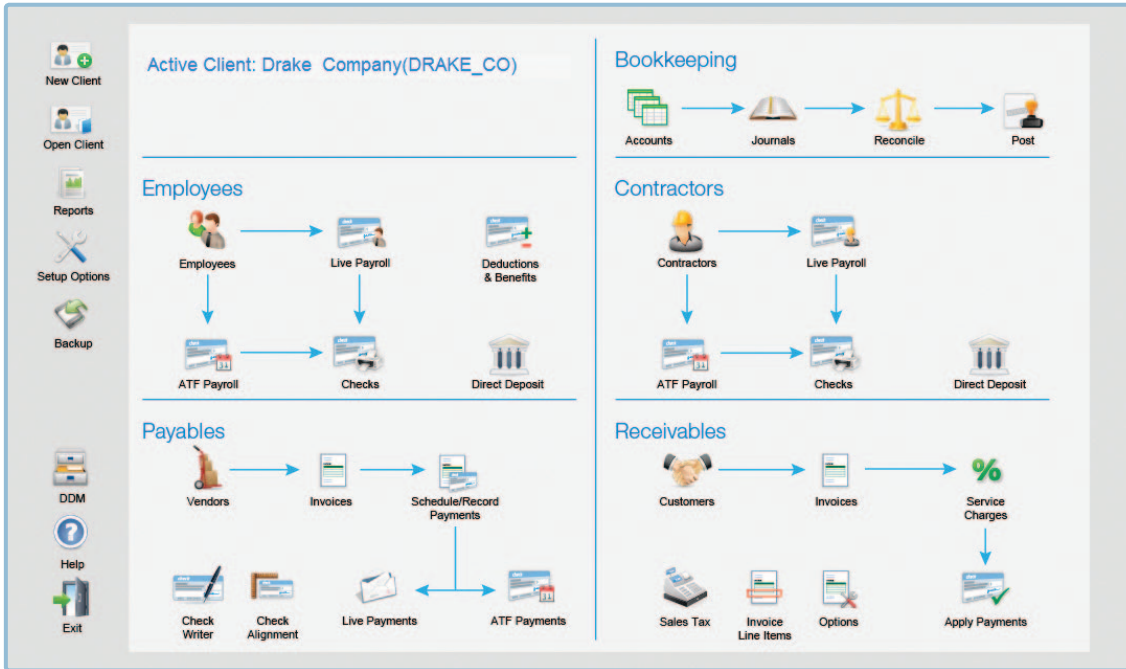
- > Produce faster, clearer PDF images with the integrated Drake PDF Printer.
- > Password-protect your DDM files.
- > Watermark documents as Final, Review, or Draft.
- > Pre-set default descriptions for scanned documents. With its ability to easily organize tax returns, work papers, client communications, and reports, the DDM is an office manager's best friend.



Either back up or restore DDM files from the same DDM Backup window.

ONE Software, ONE Support System, ONE Price

Preparers who offer accounting services can use Drake's Client Write-Up (CWU) program to integrate payroll, accounts payable, accounts receivable, bookkeeping, financial reports, Tax and Wage forms (federal and most states), and more. They can also provide Direct Deposit, Web-based payroll, and federal e-file services. Preparers who do not provide accounting services can choose to use Drake's CWU to produce payroll forms or e-file Forms 94x, W-2, and most Form 1099s.



A Full Multi-Company Write-Up Package

The Accounts Receivable Module

- > Create and print invoices
- > Apply a payment to single or multiple invoices
- > Print aging, sales tax, and invoice reports
- > Set individual credit limits and discounts for each customer

Web-Based Portals for Payroll Services

- > Process payroll
- > Upload processed pay information (to allow employer access)
- > Access vital documents instantly and securely

CheckWriter

- > Print checks quickly and easily for vendors and non-vendors
- > Split checks among an unlimited number of accounts

Accounts Payable

- > Use MICR and pre-printed checks
- > Create an unlimited number of vendors
- > Create an unlimited number of invoices per vendor

Financial Statements

- > Multi-column profit and loss statements
- > Comparative and monthly balance sheets
- > Payroll reporting
- > GL reports by account and/or date
- > Division reports

Payroll... Live AND After-the-Fact

- > Print checks and upload direct deposit information
- > Use MICR checks or pre-printed checks
- > Produce state unemployment and wage reports
- > Print and electronically file:
 - >> 940 >> 941 >> 941-SS >> 941-X >> 943 >> 943-X >> 944
 - >> 944-SS >> 944-X >> 1096 >> 1099-MISC >> W-2 >> W-3

Bookkeeping

- > Create a Chart of Accounts by using the included templates, by importing a Chart of Accounts from another application, or create a Chart of Accounts from scratch
- > Ten years of saved data means you can enter prior-year transactions and print updated reports for those years in the current software
- > Make direct journal entries with a minimum of keystrokes

Print & Electronically File on the Fly with Minimal Setup and Data Entry

- > 940 > 941 > 941-SS > 941-X > 943-X > 944 > 1099-INT
- > 1099-MISC > 1099-PATR > 1099-R > 1099-S > 944-X > W-2 > 1096
- > W-2G > 1098-MORT > W-3

Directly export client information and account balances from the Chart of Accounts into Drake Software, saving time and keystrokes. Use spreadsheet templates to import setup and transaction information directly into Client Write-Up. Convert your Quickbooks® and Peachtree® data today. Use Drake Software and Drake Client Write-Up for all your tax and accounting needs. Print all reports to PDF and store them in the Drake Document Manager.

Drake 2011 - Schedule D Import / GruntWork Trades - Step 2

Starting Row
Select the first row where the data actually begins

1. Import File Name C:\Users\scaponto\Desktop\ND_IMPORT.xlsx
2. Start import at []

Schedule D Transaction Information (52 Records)

TSJ	F	State	City	Sold	Acquired	Proceeds	Cost	Fed w/h	Wash Sale	S/L	Description
1	1	T	GA	100	06/01/2011	\$9,092.01...	\$125,000...	\$110,000...			100
2	1	T	GA	150	07/01/2009	\$8,052.01...	\$145,000...	\$130,000...			150
3	2	T	GA	269	08/01/2007	\$9,042.00...	\$45,000.00	\$30,000.00			76
5	4	T	GA	230	07/31/2008	\$9,042.00...	\$115,000...	\$100,000...			230
6	5	T	GA	174	06/01/2011	\$9,092.01...	\$137,000...	\$122,000...			174
7	6	T	GA	208	07/01/2009	\$10,092.0...	\$157,000...	\$142,000...			208
8	7	T	GA	206	08/01/2007	\$9,042.00...	\$57,000.00	\$42,000.00			206
9	8	T	GA	256	07/31/2008	\$9,042.00...	\$127,000...	\$137,000...			256
10	9	T	GA	182	06/01/2011	\$7,052.01...	\$125,000...	\$110,000...			182
11	1	T	GA	336	07/01/2009	\$10,092.0...	\$145,000...	\$130,000...			336
12	1	T	GA	314	07/31/2008	\$9,042.00...	\$115,000...	\$100,000...			314
14	1	T	GA	364	06/01/2011	\$7,052.01...	\$137,000...	\$122,000...			364
15	1	T	GA	414	07/01/2009	\$9,052.01...	\$157,000...	\$142,000...			414
16	1	T	GA	412	08/01/2007	\$11,092.0...	\$57,000.00	\$42,000.00			412
17	1	T	GA	462	07/31/2008	\$11,082.0...	\$127,000...	\$137,000...			462
18	1	T	GA	388	06/01/2011	\$7,052.01...	\$125,000...	\$110,000...			388
19	1	T	GA	542	07/01/2009	\$9,052.01...	\$145,000...	\$130,000...			542
20	1	T	GA	489	08/01/2007	\$9,042.00...	\$45,000.00	\$30,000.00			489
21	2	T	GA	520	07/31/2008	\$11,082.0...	\$115,000...	\$100,000...			520

With this clean and simple feature, take all of your Schedule D transactions from Excel® and, with the click of a button, import unlimited entries.

In View mode, you can easily select forms for printing, access form pricing, and change the order in which forms are printed. View a tax return's forms and worksheets in a tree view, or narrow your view by form category.

Drake 2011 View/Print Client Return | Marigold, Romeo (400001003)

Data Entry Print Setup Archive Email Refresh Basic View Help Exit

Select Forms to View/Print

All Forms Sets EF Federal Worksheets Miscellaneous Notes/Messages

- Federal
 - EFSTATUS
 - 1040
 - E
 - 3903
 - 8582
 - 8879
 - 9325
 - 8880
 - CRED_LMT
- Miscellaneous
 - WK_8606N
 - WK_85821
 - PRIVACY
 - LETTER
 - COMPARE
 - SUMMARY
 - BILL
 - FOLDR
 - DD_SUMM
 - 8582_AMT
 - ENGAGE
 - WK_MAGI
 - WK_CARRY

Form 1040 Department of the Treasury - Internal Revenue Service (99) **2011** OMB No. 1545-0074 (IRS Use Only-Do not write or staple in this box)

U.S. Individual Income Tax Return

For the year Jan. 1-Dec. 31, 2011, or other tax year beginning 2011, ending 2011

Your first name and initial: **Romeo** Last name: **Marigold** See separate instructions
 If a joint return, spouse's first name and initial: Last name: **Marigold** Spouse's social security number: **400-00-100**

Home address (number and street), if you have a P.O. box, see instructions: Apt. no. **123 Mulberry St.** Make sure the SE and on line 6e is
 City, town or post office, state, and ZIP code, if you have a foreign address, also complete spaces below (see instructions). **Bishop CA 93512** Presidential Election Card
 Foreign country name Foreign province/county Foreign postal code Check here if you or your spouse jointly want \$3 to go to this fund; a box below will not change you, refund.

Filing Status: 1 Single 2 Married filing jointly (even if only one had income) 3 Married filing separately: Enter spouse's SSN above 4 Head of household (with qualifying person) (See instructions. If the qualifying person is a child but not your dependent, enter this child's name here.) 5 Qualifying widow(er) with dependent child

Exemptions: 6a Yourself. If someone can claim you as a dependent, do not check box 6a. 6b Spouse. 6c Dependents: (1) First name Last name (2) Dependent's social security number (3) Dependent's relationship to you (4) If former spouse (see instructions)

if more than four dependents, see

Ralph Marigold 400-00-1055 Parent

Boxes one on 6a and No. of one on 6c who: head of did not you due to or spouse (see instructions)

Early Delivery, Intuitive Data Entry & Fast Calculations

Get it Fast, Get it Right

Flexible Data Entry > You're in control! Choose from our standard data entry method or a forms-based method. You can also define field selections, lock fields, or even establish which screens will be accessible from the Data Entry Menu.

Simple Navigation > Navigating through the return process is fast and simple. Any time during data entry, click once to view generated forms or open a summary of the return. From the Summary window, another click selects the return for e-filing.

Always Current > Keeping your software up-to-date is easy. With the Update Manager's automatic updates, you never miss a program update.

Features to Save You Valuable Time

2D Barcode Scanning > Does a W-2 or K-1 have a 2D barcode? You can scan it directly into the software — a quick and simple process that ensures data accuracy. (A 2D barcode scanner is required.)

Shortcut Keys & Macros > Simplify data entry with preprogrammed shortcuts or custom macros that reduce repetitive keystrokes.

Autofill Features > The Employer Identification Number (EIN) and ZIP code databases allow you to save time by entering EIN and address information only once. The EIN database automatically fills employer fields on future returns after your initial entry of EIN information, while the ZIP code database completes the city and state fields for you once you've entered your client's ZIP code.

Quick Estimator > Estimate your client's refund with minimal data entry and a few simple clicks.

Tax Planner

Use Scenario Planning interface for basic changes, or drill down further into the return for more complex adjustments.

Import & Export Features

Drake makes it easy to transfer data from one return to another.

8615 Export > Save time and simplify data entry by using a quick, two-step process to export parents' tax information to a child's Form 8615.

K-1 Export > K-1 data from 1041, 1120S, and 1065 returns easily flows into 1040 tax returns.

W-2 Import > Download W-2 information directly into Drake data entry.

Trial Balance Import > Simply enter data from your balanced books into our trial balance spreadsheet and import the information directly into an 990, 1120, 1120S, or 1065 return.

Forms & Schedules

With more than 6,000 federal and state forms and schedules, Drake Software includes:

- | | | | | | |
|--------|----------|----------|--------------|---------|----------|
| > 1040 | > 1040NR | > 1041 | > 1065 | > 1120 | > 1120-H |
| > 4720 | > 5471 | > 1118 | > 3115 | > 1120S | > 706 |
| > 709 | > 990 | > 990-PF | > All states | | |

Simplifying Your Transition

When you become a Drake customer, you can bring your client's prior-year tax returns with you, thanks to our free data conversion service.

How do I bring my prior-year client files into Drake?

1. Install the conversion program. (It can be downloaded from the Drake website or installed from the provided CD.)
2. Run the conversion program and convert your prior-year client data into Drake format.
3. Review the converted files.
4. Update to next year's version of Drake Software.

Drake understands the importance of a solid conversion. Drake's Conversion Group is a dedicated team of software developers, quality-assurance personnel, and support staff that have the expertise and experience to convert your data correctly.

A Smooth
>>> *Transition*

Drake Software is proud to be a qualified sponsor of continuing education with NASBA's National Registry of CPE Sponsors, the California Tax Education Council (CTEC), the Texas State Board of Public Accountancy (TSBPA), and the Internal Revenue Service for enrolled agents and registered tax return preparers.

www.DrakeSoftware.com/Training/CPECredits.aspx



Tools for Success

Preparer Websites at 1040.com

Full package customers can grow their business by allowing tax payers to complete and file their own tax returns through a customizable preparer website at www.1040.com. It's easy to create, maintain, and monitor, and is a potential profit center.

Taxpayers can prepare their returns from the comfort of their homes using Drake's safe, reliable, and accurate system. It's easy to see why it's voted #1 by the readers of *CPA Practice Advisor* time and time again.

Online Payment Options

Drake offers two convenient options for paying a balance online. With Integrated File and Pay, the balance is paid automatically via direct debit once the e-filed return is accepted. With www.1040paytax.com, your client can go online and pay the balance due after you've e-filed the return.

Free Marketing Tools

Drake Software customers have free access to marketing materials at www.Support.DrakeSoftware.com. Our custom marketing kits include numerous print materials, as well as radio and video files free to download and use. While some of the printed materials are available at cost, you can download all artwork free as PDF files.

"I am starting my own business this year after working for a major tax company for 12 years. I am so happy I found Drake Software as I feel I have the tools I need to serve my clients."

Dorothy > NEW Valued Drake Software Customer

Minimum System Requirements

Supported Operating Systems:

- > Windows XP
- > Windows Vista
- > Windows 7
- > Windows Server 2003
- > Windows Server 2008

Minimum System Requirements:

- > 800 MHz processor
- > 512 MB of RAM
- > Monitor capable of 1024 x 768 screen resolution
- > CD Drive
- > 200 MB of available hard drive space, plus 7 MB for each state program
- > Internet Explorer 7.0
- > Internet access (*required for regular updates*)
- > HP - compatible laser printer (*strongly recommended*)
- > TWAIN - compliant scanner (*strongly recommended*)

These are the minimum requirements to run Drake Software on most systems. For superior performance, we recommend system upgrades above the stated minimums. Actual requirements will vary based on your system configuration, in addition to which application and features you wish to install.

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.

"Drake Software? Love it! I've been a loyal customer since 1996. Customer support is the best of any I have ever used! The phone is always answered by knowledgeable & friendly personnel with no annoying prompts. I can't imagine a tax season without Drake Software."

David > Valued Drake Customer for 16 Years

About Drake

Drake Software was first marketed in 1977 and the company has experienced rapid growth ever since. We offer both experience and stability to professionals in the tax preparation industry.

Drake Software is located in the beautiful mountains of Western North Carolina and employs more than 300 federal and state programmers, administrative and fulfillment personnel, and customer support staff. 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
Business Started	>>>>>>>>>>>>	1977
Employees	>>>>>>>>>>>>	325+
TY 2010 e-File Statistics	>>>>>>>>>>>>	More than 19 million federal & state accepted returns
Federal e-File	>>>>>>>>>>>>	Available since 1986
Internet e-File	>>>>>>>>>>>>	Available since 1998
State e-File	>>>>>>>>>>>>	Available since 1993
Operating Systems	>>>>>>>>>>>>	XP, Vista, or Windows 7
Letters	>>>>>>>>>>>>	All customizable
Comparison	>>>>>>>>>>>>	Three-year comparison of key return line items
Diagnostics	>>>>>>>>>>>>	Information on each return's possible errors
Reporting	>>>>>>>>>>>>	Real-time web reporting & software-generated reports available
Support Options	>>>>>>>>>>>>	Phone, fax, e-mail, online Knowledge Base
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)
Calls Answered	>>>>>>>>>>>>	Less than 9 seconds

Sales Webinars at www.DrakeSoftware.com

The image features a central text element at the top. Below the text, there are several horizontal decorative bands. The top band is a solid blue line. Below it is a white band with a faint, light blue circuit-like pattern. This is followed by another solid blue band, then a white band with a similar circuit pattern, and finally a bottom solid blue band. The overall design is clean and modern, with a focus on blue and white tones.