THE PROFESSIONAL TAX SOLUTION

AWARDS

2015 CPA Practice Advisor Readers' Choice

#1 *Federal/State Income Tax Compliance*
#1 *Tax Planning Systems*
#1 *Document Mgmt & Document Storage*
#1 *Website Builders*

CPA Practice Advisor 2014 Review of Drake Tax

Overall Rating	★★★★½
Core Product Function/Features	★★★★★

2014 Sorting Out Software Survey National Association of Tax Professionals

#1 *Overall Satisfaction*
#1 *Network Compatibility*
#1 *Ease of Installation*
#1 *Ease of Working With*
#1 *Customer Support*
#1 *Technical Support*
#1 *Price*
#1 *Conversion Package*
#1 *Timely Software Updates (State & Federal)*
#1 *Reliability*

2014 Tax Software Survey by The Tax Adviser and Journal of Accountancy

#1 *Ease of e-File*
#1 *Ease of Installation*
#1 *Ease of Use*
#1 *Form Updates*
#1 *Most Recommended for New Practice*
#1 *Price*
#1 *Support (Both Ease of Obtaining & Quality)*
#1 *Price Satisfaction*

> *"Tax law is complex, for both federal and state taxes, and you have to use software that keeps pace with the changes. If we are going to guarantee our work, we want software we can rely on. That's why we rely on Drake."*
>
> **John › Valued Customer Since 1996**

SCHEDULER 📅24

Set up appointments, create daily schedules, send email reminders, and more.

Read more on page 8

LETTERS ✉

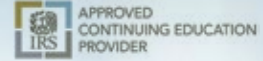All new Outline Mode and additional templates streamline client correspondence.

Read more on page 8

TRAINING & CPE

Evaluation Guide › This guide introduces navigation, setup, and e-filing. Complete walkthroughs for preparing Forms 1040, 1120, and 1065 in your Drake Software to earn CPE.

e-Training Center (ETC) › ETC can be used as a resource to train your entire office. Earn CPE quickly and easily online by attending a webinar. Choose from several tax- and software-related topics. ETC also offers interactive tax courses on a variety of topics, all with the option of earning CPE credit. Visit **DrakeETC.com** for more information.

Drake Passport to Success › Our Passport to Success helps 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 **Support.DrakeSoftware.com**.

Video and Tutorial Libraries › Available online and as links in the software, short videos and tutorials provide step-by-step instruction to help you learn the ins and outs of Drake. Designed to provide quick visual help on specific software features, these videos are available on various setup and data-entry screens throughout the software. We've saved them all to a central location so you won't have to hunt through the software to find one. (From the toolbar on the Home window of Drake, click the Help icon and select Drake Software Video Tutorials. Internet access is required.)

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, visit **DrakeSoftware.com › Training**.

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 Software® CD, from within Drake Software, or online at **Support.DrakeSoftware.com**. A printed version of the *Drake Software User's Manual* is also available for purchase.

Drake Help System › The Drake Help System is accessed 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.

E-FILING

FAST & EASY

AFFORDABLE CARE ACT

When it comes to the Affordable Care Act, Drake Software has you covered. Our software has been carefully designed to automate and streamline data collection for healthcare-related input. You'll find it easy to determine the Premium Tax Credit, report exemptions, calculate the shared responsibility payment, and compute insurance affordability.

Electronic Filing

As a leader in electronic filing for more than 29 years, Drake Software knows how important speed and reliability are to you. We've been part of e-filing since its inception in 1986, and we have both the experience and expertise to ensure your files are secure.

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 IRS and the appropriate states.

PDF Attachments

In Drake, it's easy to attach PDF files to your individual and business returns for e-file. You can attach PDF files imported from other programs or PDF files stored in your Drake Document Manager. PDF documents can be e-filed with 1040, 1120, 1120S, 1065, and 990 returns.

Electronic Signatures

The e-signature process is fully integrated in Drake Software, making it easy to incorporate into your existing workflow. Using an electronic signature pad, digitally sign forms associated with an e-filed return, including the 8879, consent forms, and bank documents. Drake e-Sign is authentic, tamper-proof, and securely bound to the document.

SUPPORT

With Drake, you can expect personal and prompt service – no matter what time of year. On average, our customers wait seconds, not minutes, during tax 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 find answers to specific questions. Access the Knowledge Base directly from the software or by logging on to **Support.DrakeSoftware.com**.

Email Support

Contact us by email to get answers in a format you can keep for future reference. This gives Drake Support time to thoroughly research and respond to your question. Email: **Support@DrakeSoftware.com**
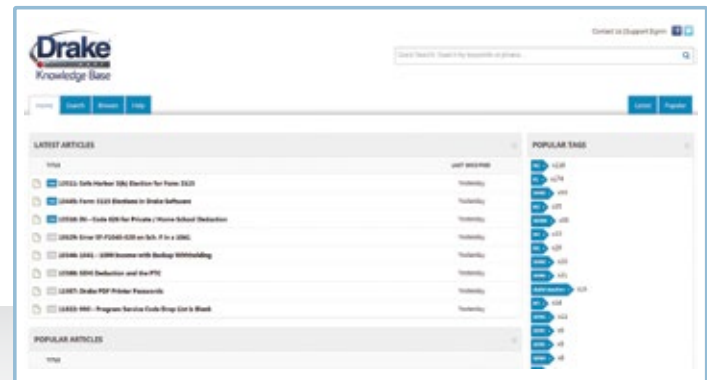
Broadcast Email

Broadcast email notifies you of the latest industry news, Drake-related updates, and other important information.

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.

> "I've been using Drake Software for more than 10 years and have always been very satisfied. The one thing that I would like to point out is that, whatever the problem, customer service is always there with a quick, accurate answer. Since my clients are usually right in front of me when I'm preparing, it's important to be able to finish the tax return quickly and accurately."
>
> **Elizabeth**
> **Valued Customer Since 2004**

DIAGNOSTICS COMPARE & REVIEW

Interactive Diagnostics

The **Calculation Results** window displays return information - including notes, fees, refund amount, and e-file eligibility – at a glance. Each message, which consists of an error code and brief description of the issue, must be cleared before a return can be e-filed. A simple click can take you directly to the problem form and field. 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.

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 Tax Planner

The Drake Tax Planner helps you assist your clients in planning for the future. By comparing the client's current tax situation to different scenarios that could occur — such as marriage, the birth of a child, buying or selling a house, and change in income — clients can see how these changes affect their finances and tax liability. Because the different scenarios are set up using the same Drake Data Entry Menu and data entry screens you're already familiar with, building scenarios is quick and easy.

Drake 2014 - Client Status Manager

Open · Search · Customize · Refresh · Filters · Quick View · Reports · Export · Help · Exit

Client Name	Type	Preparer	Status	Started	Filing...	Refund	BalDue	Total Bill
ACUTE ANGLES	1120S	Joe Thomas	On Hold	12/09/2014				$355.00
ANDER, CORY	1040	John Smith	In Progress	01/14/2015	Single	$5,295.00		
BENHUR, JUDAH & ESTHER	1040	John Smith	In Progress	02/15/2015	Joint	$2,409.00		$125.00
BIRCH, LEAF & POLLEN	1040	John Smith	In Progress	01/09/2015	Joint	$1,278.00		$155.00
BIRD, EARL E & MYTLE	1040	Joe Thomas	Complete	12/30/2014	Joint		$735.00	$125.00
BUNDLE, THYME	1040	John Smith	In Progress	12/31/2014	Single	$247.00		$99.00
CORPORATE ENTITY	1120	Jane Jones	New Client	12/09/2014			$6,082.00	$280.00
DWYER, BARB	1040	Jane Jones	Complete	11/28/2014	Single	$2,125.00		
ESTER, POLLY	1040	Joe Thomas	EF Accepted	12/30/2014	HOH		$517.00	$135.00
FANNY PRICE INC	1120	John Smith	Under Extension	01/22/2015				$275.00
FAVORITE TRUST	1041	John Smith	EF Accepted	12/09/2014				
FEATHERS, ROBIN & BIRDIE	1040	Jane Jones	Complete	11/28/2014	Joint	$4,734.00		$145.00
FRAPPLES, BOB & BETTY	1040	John Smith	In Progress	12/09/2014	Joint			
GATSBY, JAY	1040	John Smith	In Progress	02/03/2015	Single		$1,135.00	$155.00
GREEN, OLIVE	1040	John Smith	EF Accepted	12/30/2014	HOH		$4,245.00	$145.00
HOPE, ANNIE	1040	John Smith	EF Accepted	12/09/2014	Single	$1,377.00		$125.00
JONES, INDIANA & MARION	1040	John Smith	EF Accepted	01/15/2015	Joint		$353.00	$125.00
KATZ, BOB & KITTY	1040	John Smith	In Progress	01/14/2015	Joint	$11,352.00		
KOOL SYSTEMS	1120	Joe Thomas	Under Extension	11/26/2014		$288.00		
LAKESIDE FERTILIZER MFG	1065	Jane Jones	New Client	11/26/2014				
LAW, MARSHALL	1040	John Smith	EF Pending	12/30/2014	Single			
LOUISA MAY TRUST	1041	John Smith	Under Review	02/03/2015				$225.00
MAJOR, DEE	1040	Joe Thomas	EF Pending	10/16/2014	HOH	$8,908.00		$175.00
MANDER, SAL A	1040	Jane Jones	Complete	11/13/2014	Single		$895.00	$125.00
MISS HAVISHAM FOUNDATION	990	John Smith	Complete	02/03/2015				$255.00
NING, MORN & EVE	1040	Joe Thomas	EF Accepted	11/28/2014	Joint	$412.00		$125.00
PEPPERS, CAYENNE & BELL	1040	Joe Thomas	EF Rejected	11/13/2014	Joint	$7,320.00		$125.00
POLICYHOLDERS, NEWLYWED & B...	1040	Joe Thomas	Under Extension	11/18/2014	Joint		$1,490.00	$155.00
SIMPLE PARTNERSHIP	1065	John Smith	Signed	12/09/2014				

Record 1 of 42 (42 Total Unfiltered Records)

Software Customization

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

Preparer Security › Manage your internal controls with confidence by employing security settings for preparers and other office personnel. As the administrator, you control access and can implement software policy to support your office policy. Choose to assign security settings on an individual or group basis.

Client Status Manager (CSM)

› View, search, and filter your client list
› 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

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 emails 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.

PRACTICE MANAGEMENT

Customized Letters

The Client Communications Editor allows you to customize client results letters for your needs: tailor the messaging, modify fonts and formatting, and select the return data you want to include. In addition to result letters, you can customize your engagement letter, privacy policy notice, appointment reminder letter, estimated payment reminder letter, and more.
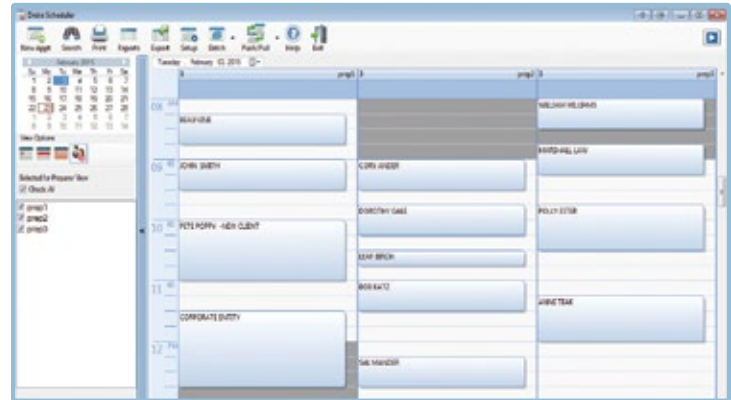
Appointment Scheduler

Use the scheduler to set up appointments for one preparer or a group of preparers, set daily schedules for an entire office, generate batch appointments, and send email reminders to clients. There are tools for customizing, printing, importing, and exporting schedules. A separate icon will be added to your desktop when Drake is installed, giving you access to the scheduler from outside of the software.

Proformas and Organizers

Print organizers and mail them to your clients, or save them to the document manager as PDF files for electronic distribution. You can even upload them directly to your SecureFilePro online portal,* streamlining the data collection process with the taxpayer.
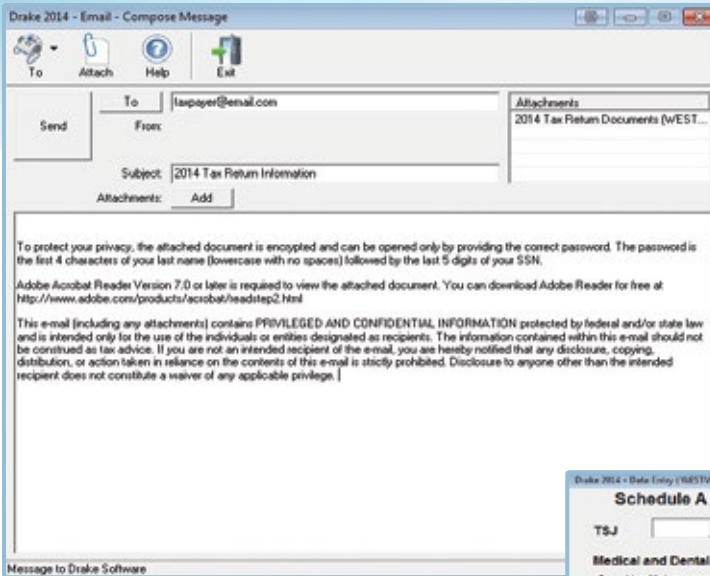
Proformas are also available for input sheet-based data entry.

*Using the online portal requires a separate fee.

> *"I would recommend Drake Software to anyone starting out. It's so easy to setup, the support is incomparable, and they think like a tax preparer. On top of that, Drake Software is easy to update each year. Don't even look at the others. Just buy Drake."*
>
> **Diane > Valued Customer Since 1996**

PDF Printer

With the Drake PDF Printer, you can easily print the tax return to a PDF file, encrypt it with a password, and store it in the Drake Document Manager.

You can even email a client directly from inside a tax return and, with one click, attach a password-protected PDF copy of the return.

Flagged Fields

Prevent mistakes with field flags. By setting a field flag, you direct the software to require follow up on that field prior to finalizing the return. Use them in two different ways:

> Set field flags on-the-fly when you need a reminder to follow up on a particular form or line item

> Set field flags globally to ensure your office procedure is followed for every return

PRACTICE MANAGEMENT

Reporting

Client, EF, and Scheduler Reports › Access the data you need to make sound business decisions with the Drake Report Manager. 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 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 with the Multi-Office Manager (MOM). Reports can be downloaded in spreadsheet format.

Download | Print

Records Returned: 406   Page: 1 2 3 4 ... 21   Lines per Page: 20 ▼

Name	Last 4 SSN	Ack Date	Ack Code	Trans Date	Type	Bank Product	Tax Year	Bill Total
BETH, NAKESHA	3365	01/27/2015	Accepted	01/27/2015	1040		2014	657.00
MACIAS, AUBREY & LOURDES	4552	01/27/2015	Accepted	01/27/2015	1040		2014	899.00
BUTLER, NOE & LISETTE	5648	01/27/2015	Accepted	01/27/2015	1040		2014	557.00
MELENDEZ, WOODROW & LATRICIA	5797	01/27/2015	Accepted	01/27/2015	1040		2014	607.00
VAN ORSOY, ALEJANDRO	6437	01/27/2015	Accepted	01/27/2015	1040		2014	929.00
CHARLES, JOSHUA	7419	01/27/2015	Accepted	01/27/2015	1040		2014	860.00

Multi-Office Manager (MOM) › Designed for the multi-office environment, MOM allows you to track workflow of multiple offices, providing a snapshot of your entire business. Reports and statistics on demographics, return status, return type, bank products, payments, fees, and billing information are available.

TaxPayer Lookup	ID Number:	Name: Address:	
		Phone:	

Accepted Returns

Federal 1040A	Submission Id: 000000005407027098C	DCN: 000000 000000	
Transmitted: 1/27/2015 17:36 EST	Acknowledgement: A - 1/27/2015 **Get 9325**	Refund: $2,348.00 Bank-issued Check	
Filing Status: 4	Preparer: 4	AGI: $5,065.00 EIC: $2,000.00	
Tax Year: 2014	Bill Amt 458.00		

NCD400	Submission Id: 000000022000027110665	DCN: 000000000000	
Transmitted: 1/27/2015 17:35 EST	Acknowledgement: A - 1/30/2015	Refund: $143.00	
Filing Status: 4	Preparer: 4	AGI: $5,065.00	
Tax Year: 2014	Bill Amt 207.00		

DRAKE DOCUMENT MANAGER

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, the DDM, and the SecureFilePro™ portal all at the same time! Scan all your source documents into organized and easy-to-find client files. The DDM is fully compatible with TWAIN-compliant scanners. You may also save any electronic document, from any software, directly to the DDM.

Handling your important documents with the DDM

› Produce faster, clearer PDF images with the integrated Drake PDF Printer
› Password-protect your 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.

Time Savers:

› Integrated email launcher
› Password protection
› Link to external files
› Administrative tracking of file activity
› Import/Export capabilities
› Customizable cabinets and folders
› Backup utility

"There are several things I like about Drake Software. I'm very pleased with the cost of the software, especially given all the additional benefits like Client Write-Up, Drake Document Manager, and SecureFilePro. Continuing Education offered by Drake is reasonably priced and very informative, and when I have to call support they are always very helpful."

Kitty › Valued Customer Since 2010

CLIENT WRITE-UP

A FULL MULTI-COMPANY WRITE-UP PACKAGE

ONE Software, ONE Support System, ONE Price

The Drake Software® Client Write-Up (CWU) program helps you provide accounting services such as payroll, accounts payable, accounts receivable, bookkeeping, financial reports, and tax and wage forms (federal and most states). You can also provide direct deposit, Web-based payroll, and federal e-file services. If you do not offer accounting services, use Drake's CWU to produce payroll forms or e-file Forms 94x, W-2, and most Forms 1099.

Accounts Receivable

> 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 (additional charges apply)
> 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 or date
> Division reports

Other Features

> Export client information and account balances from the Chart of Accounts
> Use spreadsheet templates to import setup and transaction information into Client Write-Up
> Convert your Quickbooks® and Peachtree® data
> Print all reports to PDF and store them in the Drake Document Manager

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
> Supports Direct Deposit through Intercept EFT(R) (additional charges apply)
> Print and e-File:

›› 940	›› 941	›› 941-SS	›› 943	›› 944	›› 945	›› 1096
›› 1099-MISC	›› W-2	›› W-3				

> Print:

›› 941X	›› 943X	›› 944X	›› 945X	›› W-2C	›› W-3C

Bookkeeping

> Create a Chart of Accounts by using the included templates, importing from another application, or creating one from scratch
> Enter prior-year transactions and print updated reports drawing from ten years of saved data in the current software
> Make direct journal entries with a minimum number of keystrokes

Print and e-File on the Fly with Minimal Setup and Data Entry

> Print and e-File:

›› 940	›› 941	›› 941-SS	›› 943	›› 944	›› 945	›› 1098
›› 1099-A	›› 1099-B	›› 1099-C	›› 1099-DIV	›› 1099-INT	›› 1099-MISC
›› 1099-PATR	›› 1099-R	›› 1099-S	›› 1096	›› W-2	›› W-2G	›› W-3

> Print:

›› 941X	›› 943X	›› 944X	›› 945X

PRODUCTIVITY

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, and establish which screens will be accessible from the Data Entry Menu.

Simple Navigation › Navigating through the return process is fast and simple. Entering data, reviewing the completed return, and e-filing are all optimized into one streamlined workflow to ensure maximum productivity.

Always Current › Keeping your software up-to-date is easy. With the Update Manager's automatic updates, you never miss a program update.
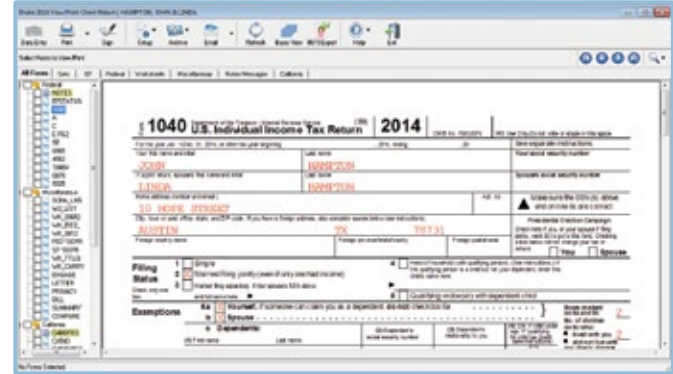
Features to Save You Valuable Time

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 and Macros › Simplify data entry with preprogrammed shortcuts or custom macros that reduce repetitive keystrokes.

Autofill Features › Save time by only entering employer information once. After completing a W-2 or Form 1099 screen, the information is saved in a database that will automatically complete fields on new screens or returns using that employer's information.

Quick Estimator › Estimate your client's refund with minimal data entry.

"I've been using Drake Software for the last six years. A few years ago, our database went down at deadline. Drake's customer support stayed up all night long helping us rebuild it, and they got us up and running. We met those deadlines. Every time I picked up that phone, support was there. And if they couldn't answer the question right away, they actually called me back. That's what I like about Drake."

James › **Valued Customer Since 2004**

Research

Access a custom Internet search tool that provides accurate, relevant search results from a library of tax resource websites, by eliminating unwanted results and returning the information most valuable to you.

Tax Planner

Create current-year and next-year scenarios and analyze the differences using the Compare report.

Import and Export Features

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

8615 Export > Save time and simplify data entry by exporting parents' tax information directly to the child's Form 8615.

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

W-2 Import > Download electronic W-2s from select companies and import directly into the client's return.

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

Forms and 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		

Import unlimited Schedule D transactions from Excel® into Drake with the Schedule D Import tool.

CONVERSIONS

Use our free data conversion service to transfer prior-year client tax return data into Drake.

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

1. Install the conversion program. (Download from the Drake website or install 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 Team is a dedicated group of software developers, quality-assurance specialists, and support staff that have the expertise and experience to convert your data correctly.

> *"Best software, best support, best price. Drake is an extremely well-established company. I will never use any other software for tax preparation. Even though I am required to purchase a very expensive tax prep software due to my franchise agreement, I never use it. For me, it is Drake Software or nothing."*
>
> **Diane › Valued Customer Since 1996**

Preparer Websites

Full package customers can establish an online presence with our free, customizable preparer websites. Our website builder makes it easy to create, monitor, and maintain your professional website.

Free Marketing Tools

Drake Software customers have access to marketing materials at **Support.DrakeSoftware.com**. Our custom marketing kits include free materials you can download and use. Some of our printed material is available at cost, but there's no charge to download and use the artwork as PDF files.

Ask about Additional Opportunities

GruntWorx › Streamlines your workflow using our tax automation and organization technology.

GruntWorx LITE › Streamlines your workflow using our tax organization technology.

SecureFilePro › Provides secure client file exchange portals on your own site - accessible anytime, anywhere.

Drake Hosted › Offers all the benefits of Drake Software in a Citrix-based hosted environment, providing you flexibility, redundancy, and security.

MINIMUM SYSTEM REQUIREMENTS

Supported Operating Systems:
› Windows Vista
› Windows 7
› Windows 8
› Windows Server 2008
› Windows Server 2012

All operating systems are expected to be running the latest service pack.

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.

"Since being a Drake Software customer, I have checked out numerous products – Drake is the easiest to implement. It takes care of what you need to do to prepare accurate returns. Drake is comprehensive: it automatically takes you from one form to another without forcing you to reenter client information. Drake saves us time and money, which we pass on to our clients."

 Ray › Valued Customer Since 2002

Minimum System Requirements:
› Windows Vista › 800 MHz processor and 512 MB of RAM
› Windows 7, 8, Server 2008, or Server 2012 › 1 GHz processor and 1 GB of RAM
› Monitor capable of 1024 x 768 screen resolution
› CD Drive (unless choosing download option)
› 1 GB of available hard drive space
› Internet Explorer 9
› Internet access *(required for regular updates)*

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 may vary based on your system configuration and the features and other programs you wish to install.

Recommended System Requirements:
› Windows 7 Professional 64 bit
› 2.8 GHz Processor
› 4GB RAM
› Monitor capable of 1280 x 1024 screen resolution
› High Speed Internet Access *(strongly recommended)*
› HP - compatible laser printer *(strongly recommended)*
› TWAIN - compliant scanner *(recommended for paperless office)*

ABOUT DRAKE

Drake Software was first marketed in 1977 and the company has experienced rapid growth ever since by offering 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 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	> > > > > > > > > > > > > >	400+
TY 2013 e-File Statistics	> > > > > > > > > > > > > >	More than 26 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	> > > > > > > > > > > > > >	Vista, Windows 7, or Windows 8
Letters	> > > > > > > > > > > > > >	All customizable
Comparison	> > > > > > > > > > > > > >	Three-year comparison of key return line items
Diagnostics	> > > > > > > > > > > > > >	Information to improve return accuracy
Reporting	> > > > > > > > > > > > > >	Real-time web reporting & software-generated reports available
Support Options	> > > > > > > > > > > > > >	Phone, fax, email, 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	> > > > > > > > > > > > > >	Speak with a person in seconds not minutes

"Not only would I recommend Drake Software to my peers, but in many of the classes I teach, the Drake Program becomes part of the discussion for solving problems. The commitment among management and staff at Drake, the attitude to keep improving the program, is alive and well."

Ben › Valued Customer Since 2002

🏆 CPA Practice Advisor
Readers' Choice

🏆 National Association of
Tax Professionals Sorting
Out Software Survey

🏆 Tax Adviser and Journal
of Accountancy Tax
Software Survey

DrakeSoftware.com
800.890.9500