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Mary Girsch-Bock • Aug. 18, 2017

The logo for Drake Software, featuring the word "Drake" in a bold, black, sans-serif font, followed by the word "Software" in a blue, sans-serif font. A registered trademark symbol (®) is located at the top right of the word "Software".

Drake Tax

Drake Software

Drake Tax from Drake Software is well suited for small to mid-sized accounting firms that primarily process 1040 returns for clients. Drake Tax also works well for small businesses as well.

From the [2017 Review of Professional Tax Preparation Systems](#).

Drake Tax is available as a desktop/server system as well as a hosted desktop application. Drake also offers two versions; Drake Zero and Web 1040, that can be used in offices that only need to process 1040 forms.

The latest version of Drake Software features a new data entry toolbar that offers an integrated calculator, reminder flags, the ability to toggle between various screens, and the ability to choose the best method for data entry. Also new is the addition of 12 forms that can be printed in Spanish, including Forms W-4, W-7, 2350 and 13844. A variety of shortcuts and hotkeys are available for users to utilize as well, with all data entered automatically routed to any related forms and schedules. One nice feature is the consistency of the user interface across all modules.

Drake Tax supports more than 6,000 federal and state forms and schedules including

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can provide accountants with source documents for tax preparation, and firms can easily upload completed tax documents to share with clients. The product also works with Drake Documents, so users can simply share a complete folder, if desired. SecureFilePro works with any browser.

Drake Tax offers numerous resources to reduce paper processing, including seamless integration with GruntWorx, which works on 1040 returns and organizes, bookmarks and labels scanned tax documents. GruntWorx also offers data extraction from documents directly into Drake Tax, reducing data entry considerably. Drake Documents offers customizable document organization, and allows users to import and export documents as needed. Drake Tax also offers integration with signature pads for e-signature capability.

Drake Tax offers Drake Unlimited, which supports unlimited returns and includes bundled software such as Drake Documents, mentioned earlier, Drake Tax Planner, so users can create a variety of tax scenarios for their clients, and DrakeCWU, an accounting and client write-up product that includes payroll, bookkeeping, AP, AR, Contractor Payments, and On-the-Fly Forms modules. The Drake Practice Management module is also included in the product as well. The product also integrates with TicTie Calculate, which allows accountants to markup and annotate workpapers directly from PDF's.

Drake tax also allows users to import data from QuickBooks as well as Microsoft Excel, and the application offers the ability to import data from other third-party accounting systems.

As a consistent winner of The CPA Practice Advisor's Reader's Choice Awards annually since 2004, Drake Software has an excellent reputation for outstanding customer support. One of the reasons why is the company's numerous support

options, including the ability to contact support and speak with a representative

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during tax season.

Drake Software is an excellent tax compliance product, offering a variety of deployment options that are designed with accountants in mind. For offices that only process 1040 forms, both Drake Zero (for stand-alone sites) and Web1040, (multi-sites) offer complete online access to the product. Both products are mobile friendly, and can be accessed from a tablet or smart phone. Pricing is based on the number of returns processed, though users can save some money by purchasing the software as a package.

For those that are looking for more comprehensive compliance capability, and are interested in other available modules such as Drake CWU, Drake Documents, and Drake Tax Planner, Drake Unlimited is available for \$1,495 and includes unlimited returns and unlimited e-filing, as well as the modules mentioned earlier. Drake Unlimited also offers free, online training and free support. Early renewal discounts are available each year.

2017 Rating: 5 Stars

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