

# Drake Enrollment for using Refund Advantage

1. Go to the Enterprise Office Manager and enter your credentials.



2. Fill out and save the account information:

Enterprise Office Manager

Logged in as: [user] | Sign Out | Help

Account Info Enrollment Reporting EFIN Mgmt

### Account Information - EFIN

[Save](#)

Account number: [text]  
2015 Account status: ACTIVE-NEW SALE  
EFIN status: 1  
2014 Drake serial: [text]  
2015 Client Write-Up serial: [text]  
Current bank: Refund Advantage  
Bank status: Accepted, SPA accepted  
EFIN: [text]  
Drake password: [text]  
Parent FFIN: [dropdown]  
State ID: [text]  
Customer type: Full package [dropdown]

How would you like to receive the software?

- Download only (Free) - Download all tax software releases. If your shipping address is in AK, AR, CA, DC, DE, FL, GA, HI, IA, ID, MD, MO, MT, NJ, NV, OK, OR, SC or VA, you will not be charged sales tax on the software.
- Limited CD and Download (\$39.00) - Receive the preseason release, the first January release and the final Archive release on CD in addition to being able to download them from our website
- Receive all CDs (\$79.00) - Receive periodic shipments throughout tax season including the final Archive Release. We estimate you will receive 3 additional shipments by purchasing this service.

Entity type: Corporation [dropdown]  
Primary phone: 502 444 5555  
Secondary phone: 502 555 1111  
Fax: 502 556 6864  
Owner SSN: \*\*\* \*\* 3325  
Company EIN: [text]

Contact: First name: John, Last name: Smith, Email: [text]  
Alternate Contact: First name: [text], Last name: [text]

Is an EPS Merchant Proc...

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### Address

Note: Refundo bank applications cannot be submitted with a PO Box entered in any address fields. A physical address is required.

Ship product to this location  
Street address: 123 Main Street  
In care of/Suite: [text]  
City: [text] State: OH Zip: 40241

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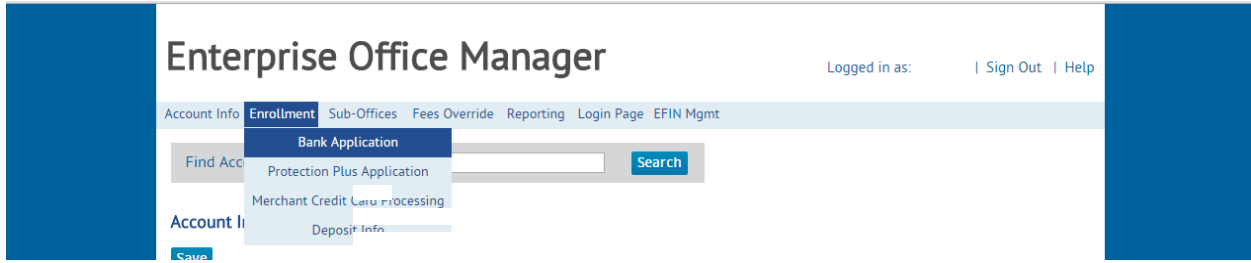
### Physical Office Location

Copy from Address

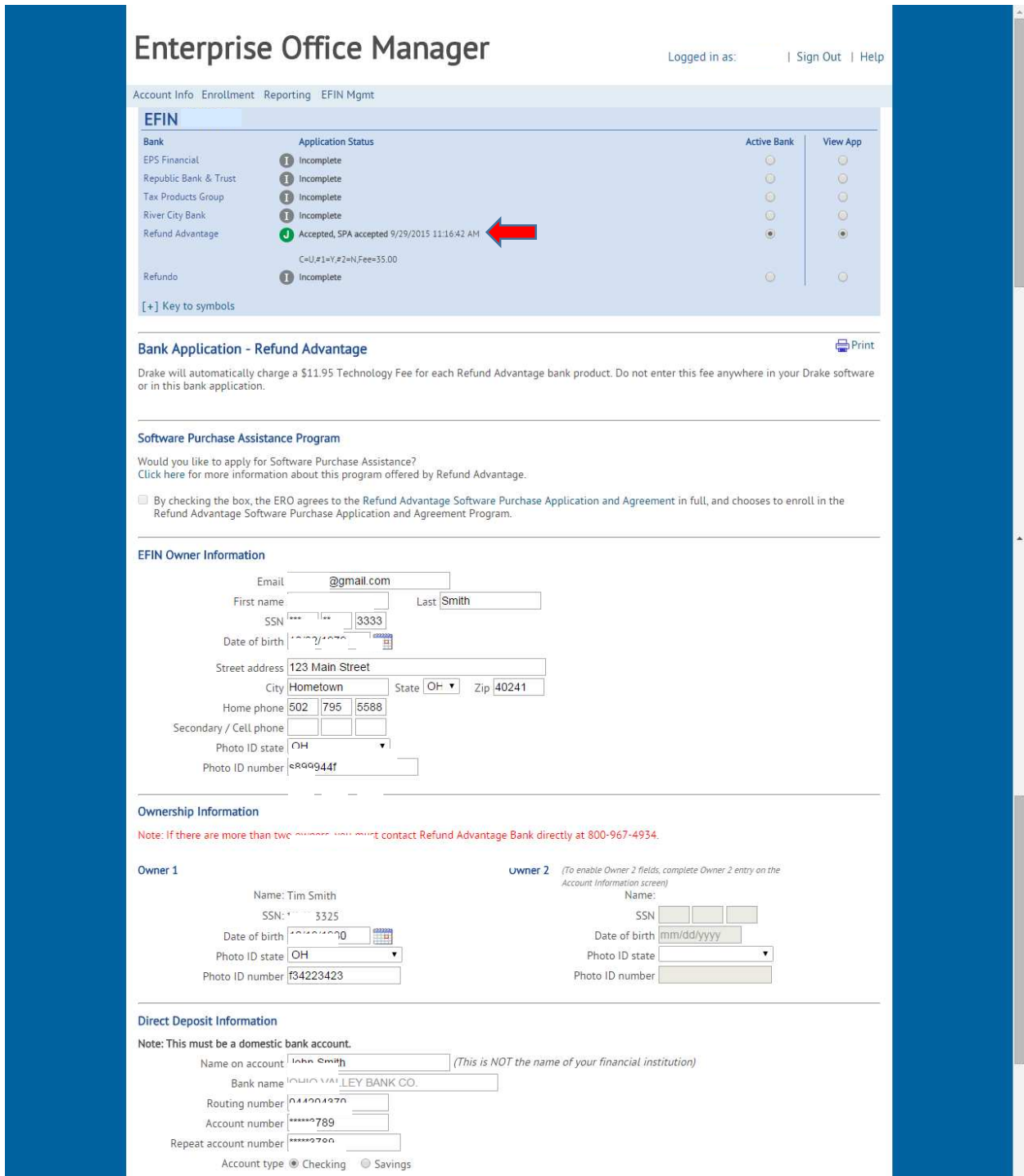
Ship product to this location

Firm name: EXAMPLE TAXES  
Street address: [text]  
In care of/Suite: [text]  
City: [text] State: [dropdown] Zip: [text]  
Special delivery instructions: [text]

3. Go to Enrollment > Bank Application:



4. Fill out the Bank Application.



### Prior Year Information

- Provided bank products last year  
 OK for Drake to send to the bank the actual numbers Drake has based on last year's e-filing?

Bank used as the Bank Product Provider in prior Tax Season

Average tax preparation fees for prior year \$

Prior year bank product volume (count)

Percentage of Federal RT products that funded for prior year

### Projections

Projected bank product volume

### Products and Fees

**Note: The amounts entered in these fields must match the amounts in Drake > Setup > Firm**

For more information regarding allowable fees for returns filed in Arkansas, Illinois, Maryland, Maine or New York, see the Arkansas Refund Anticipation Loan Act, Section 105.230 of the Illinois DOR Regulations, Chapter 730 (House Bill 1206) of the Maryland Tax Law, Chapter 248 of the Maine Tax Law, and Section 32 of the New York Tax Law.

Add-On Fee \$  (0 - 39)  
(Enter 0 if not applicable)

### Disclosures

Has anyone associated with this business ever been assessed preparer penalties, convicted of a criminal offense under federal revenue laws, or been barred from practice?  Yes  No

#### Refund Advantage ERO Agreement

ERO has received, read, and understands the Refund Advantage ERO Agreement and agrees to allow Refund Advantage to obtain a credit report on the business entity and/or owner.

Signer Name

Signer Title

[Current Active Bank](#)

[Submit Updated Application](#)

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Products and Fees for a sub office will look like this:

### Products and Fees

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Add-On Fee \$  (0 - 39)  
(Enter 0 if not applicable)

Franchise/Network Fee \$  (0 - 99)  
(Enter 0 if not applicable)