



### WHO IS IT FOR

Private equity, venture capital, hedge funds, real property, family offices, fund administrators and professional services firms that produce Schedule K-1s.

### ABOUT

This CPA-designed solution simplifies and shortens a manual, data-intensive, multi-step process into a streamlined, efficient workflow for your K-1 packages. You no longer need to struggle with overly complex and sometimes uncooperative tax software to make your K-1s look exactly the way you want them to look.

Category	Tax	Comparison
> Beginning Balance	600,000	0 600,000
> Capital Contributed During the Year	1,920,000	0 1,920,000
> Current Net Income (Loss)	(11,302,100)	(10,207,700) (1,094,400)
1. Ordinary Business Income (Loss)	3,000,000	2,116,100 883,900
2. Net rental real estate income (loss)	360,800	210,200 150,600
3. Other net rental income (loss)	37,100	66,000 (28,900)
4a. Guaranteed payments for services	0	0 0

### TYPICAL BENEFITS

For a composite org with:

**500**  
Forms

**20**  
Entities

**\$461K**  
Direct annual benefits

**32%**  
Manual data  
entry elimination

**325%**  
ROI: Independent analysis  
by Genius Drive



Eliminated data  
outsourcing  
needs & cost



Investor community  
experience w/  
timely reports &  
clear after-tax ROI

**100%**

Control &  
transparency

**4 MOS**

Payback within  
the first full cycle



Accounting staff  
engagement,  
retention & elevation

### FEATURES

#### Complete K-1 production

- First-ever fully digital investor K-1 packages, including footnotes & white paper statement data
- Easy-to-use allocation functions allowing allocations against any value anywhere
- Complete K-1, K-3 & 42 state taxing jurisdictions' K-1 & equivalent data aggregated & allocated for the pass-through & end-recipient returns
- Instant PDF creation options & compatibility with existing portal providers

#### Investor communication portal

- Electronic delivery of K-1 packages, supporting documents, or other documents
- Data management and document tracking
- All-in-one communication system that facilitates data gathering and dissemination

#### Integration with tax software

- Thomson Reuters: GoSystem Tax RS platforms
- Wolters Kluwer: CCH Axxess



### ABOUT K1X, INC.

K1x is the leading data distribution platform for alternative investments tax compliance. The fintech company's patented, AI-powered SaaS solution digitizes and distributes data seamlessly—connecting investors, advisors, tax software, portals, accounting firms, IRS and state taxing authorities—simplifying complex processes, accelerating filings, reducing costs, and delivering greater control, transparency, and accessibility. K1x is battle-tested by the best, and trusted by more than 8000 organizations including 44 of the 100 largest institutional investors in the US, 20 of the top 25 accounting firms, 11 of the top 100 private foundations, 45 of the top 100 university endowments, and 7 of the top 40 health systems.



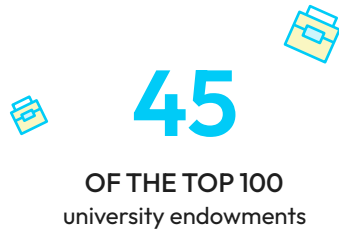
# PROVEN RESULTS

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### KEY STATS



### CLIENTS



K1X BOARD OF DIRECTORS INCLUDES B2B FINTECH SAAS EXPERTS, AI & AUTOMATION PATENT HOLDERS IN TAX TRANSFORMATION, AND FORMER HEADS OF US TREASURY AND THE IRS.

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