

MODERN, CLOUD-BASED AI TAX TECHNOLOGY

FOR TAX ACCOUNTANTS TO THRIVE DURING SEASONAL K-1, 990 & 1099 VOLUMES



Al-powered automation from K1x doesn't just save you time, money, and reduce risk exposure— it transforms compliance from a burden into untapped revenue opportunities for you.



K1 Aggregator®



🚱 K1 Creator®



990 Tracker®

RECEIVE K-1s?

Award-winning, patented tech eliminates 90% of manual K-1 data extraction in just 11.18 seconds.

- Face page
- ✓ White papers
- State reporting
- ✓ K-3s
- Automated 1099 data extraction upgrade

PRODUCE K-1s?

The first and only solution to seamlessly build a traditional K-1 package (PDF) and a completely Digital K-1™ (.k1x) transmission.

FILE 990s?

THE industrystandard software for streamlined 990 workflows including data collection, analysis, exempt reporting, integration, and IRS-approved e-filing transmission.

TRUSTED BY 15 OF THE TOP 25 ACCOUNTING FIRMS.TRANSFORM
TAX TO GET YOUR NIGHTS & WEEKENDS BACK & START GROWING.

KIX FREES YOUR TIME TO FOCUS ON GROWTH

Slashed K-1 & 990 processing times

Optional automated 1099 data extraction today & a full 1040 suite by the end of 2025

Freedom from robotic, rote tasks

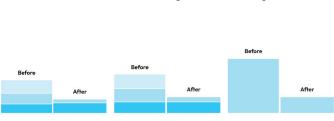
Collaboration

In-depth reporting & analysis across an entire portfolio or asset class

After-tax ROI analysis

Modernization + Scale

Larger volume? Larger ROI!



COLLECT 500K1S

- 0.9 person hours savings per portal per years
- 60% process savings
- 405 annual person hours savings
- \$26K annual savings

ANALYZE 500K1S

- 1.6 person hours savings per K1
- 26% overall process savings
- 805 annual person hours savings
- \$52K annual savings

PRODUCE 500K1S

- 1.5 person hours savings per K1
- 24% overall process savings
- 755 annual person hours savings
 - \$48K annual savings

FILE 20 ENTITIES

- 7.5 person hours savings per form
- 26% overall process savings
- 266 annual person hours savings
- \$14K annual savings

Benefits

~100%

Accuracy & 66% cycle time reduction achieved

2 WKS

To onboard *Perfect timing for the 70% of K-1 that hit all at once



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

UNLOCKING GROWTH OPPORTUNITIES

"Drastic reduction in manually inputting data using K1 Aggregator® It's a cliche, but it's true. Now we spend more time on value added work versus manually inputting data especially with state activities captured automatically."



MASSIVE TIME SAVINGS

"50% time-saving from K-1 automation using K1 Aggregator ® With K1x, it's click, click and done! Accuracy and efficiency!"

Gursey | Schneider LLP CERTIFIED PUBLIC ACCOUNTANTS & ADVISORS

ACCELERATED ADOPTION

"Through a tailored solution, comprehensive support, and a focus on user adoption, Forvis Mazars not only overcame existing challenges but also set a new standard for accelerated adoption in the industry."

> forvis mazars



PRIVATE MARKET TAX DATA. DIGITIZED. DISTRIBUTED. DECODED.

A Fast Company Most Innovative Companies 2025 honoree, K1x is building THE intelligent tax infrastructure for private markets. Our patented, AI-powered SaaS platform automates the extraction, validation, and distribution of tax data from K-1s, 1099s, and W-2s and streamlines IRS-certified 990 e-filings—delivering tax compliance and clarity. K1x connects investors, accounting firms, tax software, and taxing authorities in a seamless digital workflow—simplifying entity tax operations, accelerating filings, and reducing risk. K1x makes tawx time less taxing.















PROVEN RESULTS

Battle-tested by the best, K1x is trusted by more than 40,000 clients

KEY STATS CLIENTS

K-1s DATA EXTRACTED in 5 minutes

47
STATE & FEDERAL tax jurisdictions







KIX 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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