

WHO IS IT FOR

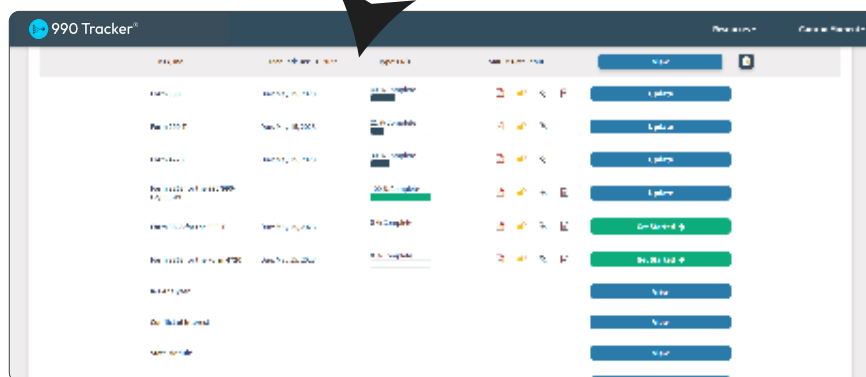
Tax exempt organizations including higher education institutions, private foundations, healthcare systems, pension trusts, and other not-for-profits that process 990s and K-1s in volume.

ABOUT

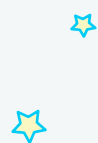
The first and most intuitive IRS-approved software designed specifically to streamline required information gathering, manage multiple aspects of tax-exempt compliance, and automate direct e-filing of completed forms.

All your tax-exempt compliance reporting & filing needs in one platform including:

- All Federal Forms
- All State Forms
- Foreign Forms
- Investment Management
- Master Compensation Reporting
- Conflicts of Interest
- K-1 Aggregator Integration



BENEFITS



90%

Reduction in manual data handling



311%

ROI: Independent analysis by Genius Drive



Typical Benefits

For a composite org with:
500 forms & 20 Entities

\$80K

+

\$39K

Form preparation productivity

Reduction in technical dept/homegrown systems

\$119K

Annual Benefits

Additional Benefits



Eliminated data outsourcing needs & cost

~100%

Accuracy & 66% cycle time reduction achieved

100%

Control & transparency

2 MONTHS

To unlock value



Accounting staff engagement, retention & elevation



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

FEATURES

Automate data aggregation

- IRS approved tax preparation solution including federal and state e-filing options
- Easy-to-use platform for all federal and state filing requirements
- One-click integration with K1 Aggregator®
- Covers all federal and state forms commonly required to complete tax-exempt filing

Modular tools in a single platform

- Federal Forms Module to complete all federal exempt filings
- State Module to complete all 47 state taxing jurisdictions forms and extensions
- Master Compensation Module for organizations with compensation reporting across multiple entities
- K1 Aggregator® module and integration with Federal and State forms
- Conflict of Interest module to manage board questionnaires

IRS-Approved filing platform

- Federal 990, 990-PF, 990-EZ, 990-T, 4720, and 8868 e-file support
- Supports forms for all 47 state taxing jurisdictions including corporate, exempt, and attorney general forms and extensions
- Now supporting more state e-files. 990 Tracker® added 22% more forms and supports e-file for 20+ jurisdictions



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.



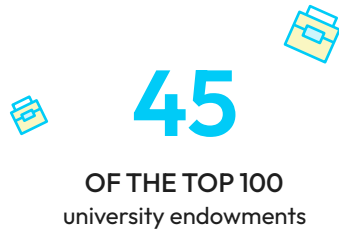
PROVEN RESULTS

Battle-tested by the best, K1x is trusted by more than 8000 clients

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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