K1x

Family Office

"K1x was a huge help pulling in information because it took data entry off us. We love its ability to move data from one K-1 line item to another — this eliminates the hassles with reclassification and eliminated data entry work.

Now we have drag and drop and integration with important third-party software.

I think everybody should use this!"

Challenge

Processing and reconciling 600 K-1s, (some as large as 150 pages) is **manual and time-consuming**

Most tax software in the market is oriented around the 1040, **did not support the K-1**

Research

Adopted K-1 Analyzer

Onboarding K-1 Navigator

Outcome

- **Eliminated 80%** of manual entry of data (and continues to improve)
- Ability to push the K-1 into the tax return while customizing the look
- Drag and drop integration with GoSystems