

WHO IT'S FOR

Accounting firms, institutional investors, banks, trusts, family offices, pensions, individuals, and corporations that receive Schedule K-1s and 1099s and want fast, easy, effective digital extractions with comprehensive tax software integrations and customizable outputs.

ABOUT

K-1 Aggregator® uses our proprietary patented AI-powered automation to streamline tax compliance for Schedule K-1 and 1099 recipients by offering:

- 100% digitization of Tax Data with accountant friendly workflows and Excel output highlighting risks and opportunities
- Reading, aggregation, and analysis of federal & state taxable income, K-3 information & foreign reporting requirements
- Reduction of time, costs, & risks
- New Aggregator Plus™ update automates 1099 & W-2 data extraction

BENEFITS

 **A week of work in minutes.**

90%

Reduction in manual data handling

287% 

ROI: Independent analysis by Genius Drive

Typical Benefits

For a sample org with:

500 forms & 20 Entities

\$90K

Savings per year

+

\$45K

In additional upside

\$135K

Annual Benefits

Additional Benefits



Leverage lower cost resources for basic tasks freeing up teams for value-add work



Achieve margin improvement, engagement efficiency and satisfied clients and staff in UNDER 2 MONTHS

~100%

Accuracy & 66% cycle time reduction achieved

100%

Control & transparency



“This allows our team to focus on more high level value adding work, resulting in better compliance and increased tax savings”

FEATURES


Automate Tax Document Digitization & Aggregation

- Comprehensively read K-1s (Federal & State) and 1099s faster and easier with Facilitated Workflow
- Automated workflow tooling enabling staff to work digitally instead of manually
- Intuitive UI allowing for deep risk analysis technical review

Automated, Digital Output reducing review time

- Custom Excel-based reports for ALL data including Federal, State, Foreign, K-3, 1099, and W-2 information
- Value-add billing opportunity identification excelling your service to clients and expanding your business
- API end-points to integrate into any process (billing, ERP, Centralized Admin functions, etc.)

Comprehensive, custom integration with tax software

- Fine-tuned control of Fed, State, Foreign, 199A, 1099, and W-2 data into tax returns keeping your filing positions intact
-  Deep integration with CCH Axxess Tax
- Also supports, TR GoSystem, ONESOURCE, CCH ProFX, and UltraTax



PRIVATE MARKET TAX DATA. DIGITIZED. DISTRIBUTED. DECODED.

K1x is the patented, AI-powered platform that takes tax data from intake to insights for private markets. A Fast Company Most Innovative Companies 2025 honoree and US Fintech Award winner for Best Accounting Tech, K1x streamlines the extraction, validation, and delivery of K-1s, 1099s, W-2s, and 990s—eliminating the nights-and-weekends data drudgery of keying, collating, and copy-pasting so professionals can file faster and focus on strategic, higher-value work.

Our dedicated K1xperts work tirelessly to give you the freedom to take back your time, unleash your talent, and turn tax compliance chaos into growth opportunities.

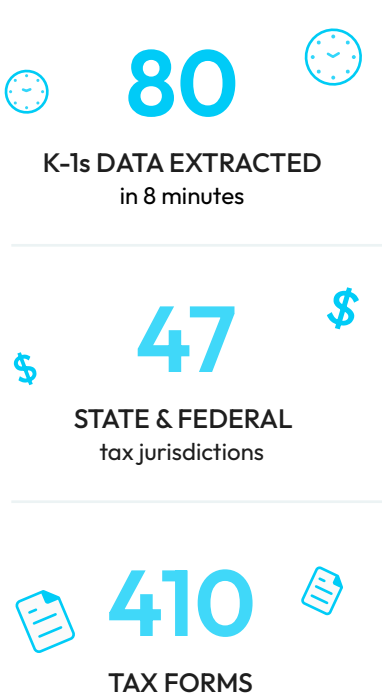
AWARDS & CERTIFICATIONS



PROVEN RESULTS

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