K1 Aggregator®
BY K1X

AUTOMATED AGGREGATION & REPORTING OF STRUCTURED AND UNSTRUCTURED K-1 DATA

AUTOMATICALLY Reads & Aggregates all 1200+ Fields of the K-1 & K-3
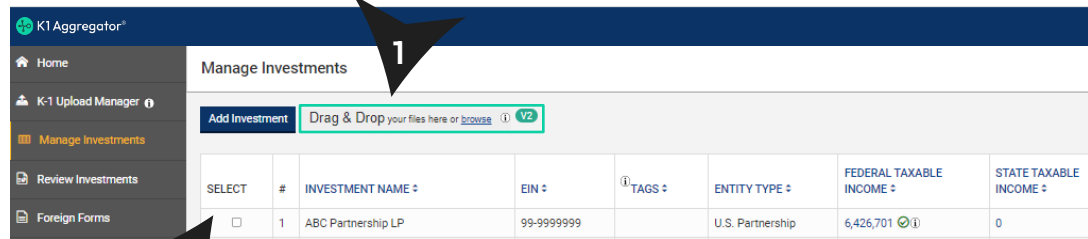
WHO IT'S FOR

Accounting firms, institutional investors, banks, trusts, family offices, pensions, individuals, and corporations that receive Schedule K-1s in volume.

ABOUT

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

- 100% digitization of extracted K-1 Form data with executive summary highlighting critical tax data elements

- Reading, aggregation, and analysis of federal & state taxable income, K-3 information & foreign reporting requirements

- Reduction of time, costs, & risks

1. Input: Drag & drop your unstructured PDF K-1 data

2. Outputs:

- Receive a structured data table

- Excel-based data extraction summary

- Robust in-app analytics

- PDF or XML foreign forms

- At-a-glance view of extracted but unmapped K-1 data (including PDF page) helps you focus on exceptions

- Direct integrations to K-1x, WK and TR products

BENEFITS

11.18
Seconds to extract & aggregate

90%
Reduction in manual data handling

287%
ROI: Independent analysis by Genius Drive

Typical Benefits

For a composite org with:

500 forms & 20 Entities

$90K + **$45K**
Savings per year   In additional upside impacts

$135K
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 K-1 data aggregation

- Automatically aggregates ALL state & federal K-1, K-3, & foreign disclosure data for portfolio-level review & reporting

- Provides state taxable income allocations for ALL 42 taxing jurisdictions

- Extracts the entirety of the state K-1 & provides this data in an easy-to-use grid that exports to excel for 10 states (15 forms)

Risk analysis and review

- Filterable/customizable data reports & exports for deep risk analysis & review

- Embedded project management & review features to keep the process running smoothly

- Tenant Level Master K-1 helps users conduct tax analysis across entire portfolio—all tax data elements viewable in one report

Integration with tax software

- K1x
  Import K-1/ K-3 data from K1 Aggregator into K1 Creator, 990 Tracker

- Wolters Kluwer:
  CCH Axcess Tax, Prosystem fx

- Thomson Reuters:
  ONESOURCE Income Tax, ONESOURCE Trust Tax, GoSystem Tax RS platforms (Including UBI Export to GoSystem RS for trust returns), Ultra Tax

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.
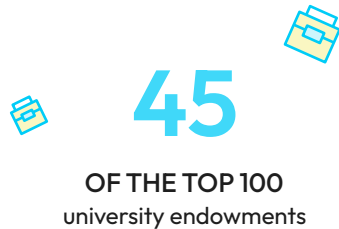
PROVEN RESULTS

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

KEY STATS

11.18
SECONDS OF DATA
extraction per K-1

42
STATE & FEDERAL
tax jurisdictions

177
TAX FORMS

CLIENTS

44
OF THE TOP 100
institutional investors

20
OF THE TOP 25
accounting firms

11
OF THE TOP 100
private foundations

45
OF THE TOP 100
university endowments

7
OF THE TOP 40
health systems

51
OF THE TOP 100
non profits

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.

VISIT US   FOLLOW US