



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.

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The screenshot shows a software application window titled 'K1 Aggregator'. On the left is a sidebar with 'Home', 'K-1 Upload Manager', 'Manage Investments' (which is selected and highlighted in orange), 'Review Investments', and 'Foreign Forms'. The main area is titled 'Manage Investments' and contains a table with columns: 'SELECT', '#', 'INVESTMENT NAME', 'EIN', 'TAGS', 'ENTITY TYPE', 'FEDERAL TAXABLE INCOME', and 'STATE TAXABLE INCOME'. One row is visible: '1 ABC Partnership LP' with '99-9999999' in the EIN column, 'U.S. Partnership' in the ENTITY TYPE column, and '\$,426,701' in the FEDERAL TAXABLE INCOME column. A button 'Add Investment' and a 'Drag & Drop your files here or browse' button are at the top of the main area.

2. Outputs:

- Friendly workflow encompassing multiple steps in the tax process
- Customizable Excel-based outputs and digital outputs via API
- Streamlines collaboration with existing processes and minimal disruption
- Direct integrations to K-1x, WK and TR products

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 + **\$45K**
Savings per year 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, 1099A, 1099, and W-2 data into tax returns keeping your filing positions intact
- Deep integration with CCH Axcess Tax
- Also supports, TR GoSystem, ONE SOURCE, 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



MEMBER



PROVEN RESULTS

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

KEY STATS



K-1s DATA EXTRACTED
in 8 minutes



STATE & FEDERAL
tax jurisdictions



TAX FORMS



OF THE TOP 100
institutional investors



OF THE TOP 25
accounting firms



OF THE TOP 100
non profits



OF THE TOP 100
university endowments



OF THE TOP 40
health systems



OF THE TOP 100
private foundations

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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