

WHO IT'S FOR

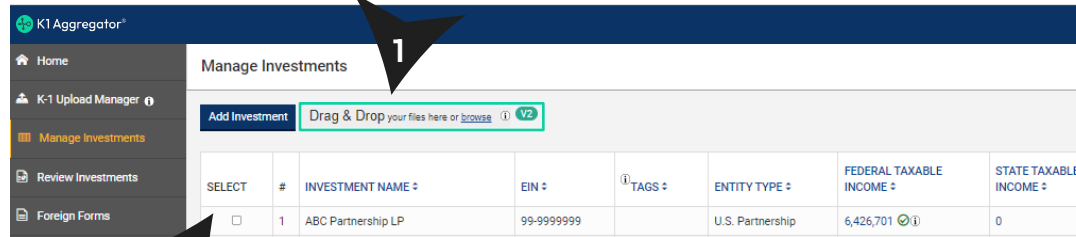
Accounting firms, institutional investors, banks, trusts, family offices, pensions, individuals, and corporations that receive Schedule K-1s in volume.

ABOUT

K1 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
- New Aggregator Plus[™] update automates 1099 & W-2 data extraction

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

Savings per year

+

\$45K

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)
- Automates 1099 & W-2 data extraction with Aggregator Plus[™] upgrade

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 Access 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



PRIVATE MARKET TAX DATA. DIGITIZED. DISTRIBUTED. DECODED.

A Fast Company **Most Innovative Companies 2025** honoree, K1x is building THE intelligent tax infrastructure for private markets. Our **patented, AI-powered SaaS platform** automates the **extraction, validation, and distribution of tax data from K-1s, 1099s, and W-2s** and streamlines **IRS-certified 990 e-filings—delivering tax compliance and clarity.** K1x connects investors, accounting firms, tax software, and taxing authorities in a seamless digital workflow—simplifying entity tax operations, accelerating filings, and reducing risk. K1x makes tax time less taxing.



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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