



# K-1 Software for Family Offices

## MODERN, CLOUD-BASED AI TAX TECHNOLOGY

COLLABORATE WITH YOUR ACCOUNTANT TO PROCESS K-1'S, 1099s, AND W-2s ON DEMAND



Take control of your K-1 data, your K-1 process and K-1 deliverables.

### PRODUCE K-1S?

Automate and customize K1 creation with comprehensive collaborative tooling that provides accurate K-1s on demand, custom statements designed in a word-based editor, and flexible packing tools allowing for easy compilation and distribution.

- ✓ Accurate
- ✓ Efficient
- ✓ Fast

Delivery of federal, state and international taxing jurisdictions with a collaborative K-1 creation tool

### RECEIVE K-1S?

Awarding-winning, patented K-1 Aggregator<sup>®</sup> eliminates 90% of manual K-1 data entry. Just 11 seconds to accurately and automatically extract PDF K-1 data.

- ✓ Face page
- ✓ White papers
- ✓ State reporting
- ✓ K-3s

**K1X IS TRUSTED BY 85 OF THE TOP INSTITUTIONAL INVESTORS, 31 OF THE TOP CAPITAL & WEALTH MANAGERS, AND 20 OF THE TOP 25 ACCOUNTING FIRMS**

#### Larger volume? Larger ROI!



**K1X DELIVERS**

- Data on-demand
- Data connectivity to other systems & processes
- Automatic allocation & taxable income visibility through multiple tiers
- Ownership of work
- In-depth reporting & analysis across the entire family office structure
- After-tax ROI analysis
- Modernization + Scale

#### Benefits

**~100%**

Accuracy & 66% cycle time reduction achieved

**2 WKS**

To onboard \*Perfect timing for the 70% of K-1 that hit all at once



Investor community experience w/timely reports & clear after-tax ROI

"The countless hours saved combined with the very high accuracy gave us more time to analyze the numbers on the page, rather than just enter them. We have more time to think since we are less 'number numb'. This is tremendous technology at a price point that smaller family offices can afford. A game changer."



**RYAN REDMOND**  
CPA TAX MANAGER AT DRAFTCO & ASSOCIATES INC.

"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!"



**FAMILY OFFICE MANAGER**



## 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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