

THE K1 AGGREGATOR® ADVANTAGE**PURPOSE-BUILT, PATENTED AI
ENGINE TRAINED ON MILLIONS
OF REAL K-1S SINCE 2010**

Dataset is ~95% of all "large partnership" complex K-1s. Uses proprietary, traceable models — never a black box.

VS

Primarily OCR with limited "out-of-the box" AI components.

**80% RICHER EXTRACTION CAPABILITIES**

Extracts ~98% of K-1 content—federal, all 42 states, K-3, whitepapers, footnotes for all entity types and pass-throughs.

VS

Most extract only 1040 K-1 forms—no line items or whitepapers.

**CONTEXT-AWARE COMPLIANCE**

AI auto-validates against IRS rules and aligns data with tax regs via smart UI and logic.

VS

No Tax Context. No Validating Interface. Just a Black Box.

**FLEXIBLE APIS WITH TAX, CRM, &
ACCOUNTING SYSTEMS**

Automates K-1 data flow—no manual entry, fully connected or decoupled as needed.

VS

Siloed Systems & Disconnected Data

**INSTANT, AI-DRIVEN INSIGHTS FOR
STRATEGIC PLANNING**

Generates review-ready docs, highlights planning opportunities, and turns every federal, SALT, and international data point into action.

VS

None known

**SOC 2 CERTIFIED AND 7216 COMPLIANT**

Uses proprietary closed LLMs—no generative AI—for secure, IRS-compliant, privacy-first data processing.

VS

Public templates

**CLIENT-DRIVEN INNOVATION SINCE 2010**

Constantly evolving with feedback, automation upgrades, and expanded extraction for 1099s, W-2s, and full 1040 workflows.

VS

Static products; outdated technologies

THE OTHERS**HOW WILL YOU USE YOUR EXTRA HOURS?****BEYOND THE FACE PAGE EXTRACT K-1
DATA FROM PDF WHITEPAPERS, K-3,
& ALL STATES!**



ABOUT K1X, INC.

A Fast Company “Most Innovative Companies 2025” honoree, K1x is the leading data distribution platform for alternative investment tax compliance as well as the industry standard, IRS-certified solution for seamless tax-exempt filings. The fintech company’s patented, AI-powered SaaS solution digitizes and distributes tax data seamlessly—connecting investors, accounting firms, tax software, IRS and state taxing authorities—simplifying complex processes, accelerating filings, reducing costs, and delivering greater control and accessibility. K1x is battle-tested by the best, and trusted by more than 8000 organizations including 44 of 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



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.

VISIT US

FOLLOW US