



K1 Creator[®]

BY K1X

K1 PRODUCTION STREAMLINED FOR YOU

WHO IS IT FOR

Private equity, venture capital, hedge funds, real property, family offices, fund administrators and professional services firms that produce Schedule K-1s.

ABOUT

This CPA-designed solution simplifies and shortens a manual, data-intensive, multi-step process into a streamlined, efficient workflow for your K-1 packages. You no longer need to struggle with overly complex and sometimes uncooperative tax software to make your K-1s look exactly the way you want them to look.

Category	Tax	Comparison
> Beginning Balance	600,000	0 600,000
> Capital Contributed During the Year	1,920,000	0 1,920,000
> Current Net Income (Loss)	(11,302,100)	(10,207,700) (1,094,400)
1. Ordinary Business Income (Loss)	3,000,000	2,116,100 883,900
2. Net rental real estate income (loss)	360,800	210,200 150,600
3. Other net rental income (loss)	37,100	66,000 (28,900)
4a. Guaranteed payments for services	0	0 0

TYPICAL BENEFITS

For a composite org with:

500
Forms

20
Entities

\$461K
Direct annual benefits

32%
Manual data
entry elimination

325%
ROI: Independent analysis
by Genius Drive



Eliminated data
outsourcing
needs & cost



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

100%

Control &
transparency

4 MOS

Payback within
the first full cycle



Accounting staff
engagement,
retention & elevation

FEATURES

Complete K-1 production

- First-ever fully digital investor K-1 packages, including footnotes & white paper statement data
- Easy-to-use allocation functions allowing allocations against any value anywhere
- Complete K-1, K-3 & 42 state taxing jurisdictions' K-1 & equivalent data aggregated & allocated for the pass-through & end-recipient returns
- Instant PDF creation options & compatibility with existing portal providers

Investor communication portal

- Electronic delivery of K-1 packages, supporting documents, or other documents
- Data management and document tracking
- All-in-one communication system that facilitates data gathering and dissemination

Integration with tax software

- Thomson Reuters: GoSystem Tax RS platforms
- Wolters Kluwer: CCH Axxess



ABOUT K1X, INC.

A Fast Company Most Innovative Companies 2025 honoree, **K1x is building THE intelligent tax compliance automation platform.** Our patented, AI-powered SaaS solution handles the extraction and distribution of tax data from complex documents like Schedule K-1s, K-3s, 990s, and 1099s—automating tax compliance and tax insights. K1x is trusted by more than 40,000 organizations, including 44 of the 100 largest U.S. 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.



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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