



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	Tax US Federal	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 Access*



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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