



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**

### K1X DELIVERS

90% less manual K-1 work

Lower outsourcing costs

Less compliance risk

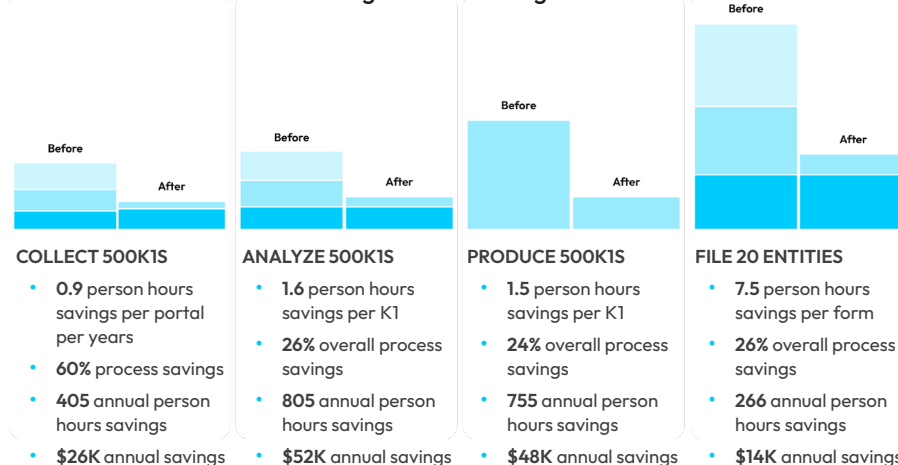
More collaboration

More tax savings

More control of data & insights

More freedom to focus on  
strategic planning & growth

### Larger volume? Larger ROI!



### 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

"We came away really impressed with the demo and overall value prop for handling K1's. I am excited to move forward."

VENTURE CAPITALIST

"This is something else entirely far beyond my expectations and my expectations are very high."

ACCOUNTING FIRM

"I used K1x at my former firm, and am so happy that we're introducing them to my firm now."

ACCOUNTING FIRM



## 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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