

# K-1 ANALYZER

AUTOMATED AGGREGATION & REPORTING OF STRUCTURED AND UNSTRUCTURED K-1 DATA

Now Automatically  
**Reads & Aggregates**  
All 1200+ Fields of the K-1 & K-3



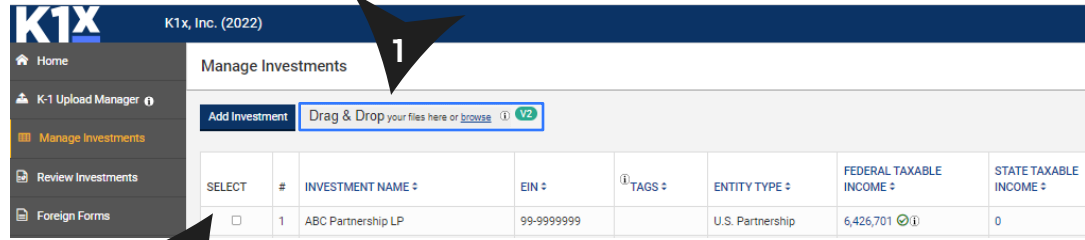
## WHO IS IT FOR

Institutional investors, banks, trusts, family offices, pensions, individuals, and corporations that receive Schedule K-1s in volume.

## ABOUT

Using AI-powered automation, K-1 Analyzer helps Schedule K-1 recipients steer through the complexities of aggregation and reporting in a transparent and collaborative way. It reads, aggregates, and analyzes federal & state taxable income, K-3 information, & foreign reporting requirements while reducing time, costs, & risks.

### 1. Input: Drag & drop your unstructured PDF K-1 data



### 2. Outputs:

- Receive a structured data table
- Excel-based reporting
- Robust in-app analytics
- PDF or XML foreign forms
- Direct integration to K1x, WK and TR products

## BENEFITS

**7.5x**  
Faster than manual processing!

**90%**  
Manual data entry elimination

**287%**  
ROI: Independent analysis by Genius Drive

### Typical Benefits

For a composite org with:  
500 forms & 20 Entities

**\$90K** Savings per year + **\$45K** In additional upside impacts

**\$135K**  
Annual Benefits

### Additional Benefits



Eliminated data outsourcing needs & cost

**~100%** Accuracy & 66% cycle time reduction achieved

**100%**

Control & transparency

**5 MOS** Payback within the first full cycle



Accounting staff engagement, retention & elevation



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

## FEATURES

### Automate K-1 data aggregation

- Automatically aggregates federal K-1 & K-3, state, & foreign disclosure data for portfolio-level review & reporting
- Reads K-1 packages from end-to-end allowing for easy data loading
- Eliminates work papers by providing a robust, organized data platform with multiple Excel-based output options

### Risk analysis and review

- Filterable/customizable data reports & exports for deep risk analysis & review
- Embedded project management & review features to keep the process running smoothly
- Deep insight into the portfolio & related risks

### Integration with tax software

- K1x: *K-1 Navigator, C-TRAC*
- Wolters Kluwer: *CCH Access Tax*
- Thomson Reuters: *ONESOURCE Income Tax, ONESOURCE Trust Tax, GoSystem Tax RS platforms*

## ABOUT K1X, INC.

K1x is the leading data distribution platform for alternative investments. The fintech company's AI-powered SaaS solution digitizes and distributes data seamlessly—connecting investors, advisors, tax software, portals, accounting firms, IRS and state taxing authorities—simplifying complex processes, accelerating filings, reducing costs, and delivering greater control, transparency, and accessibility.



# PROVEN RESULTS

K1x is trusted by more than 6000 organizations including

 **11.8**   
SECONDS OF DATA  
extraction per K-1

 **31**   
OF THE TOP 100  
institutional investors

 **19**   
OF THE TOP 25  
university endowments

 **42**   
STATE & FEDERAL  
tax jurisdictions

 **15**   
OF THE TOP 25  
accounting firms

 **7**   
OF THE TOP 40  
health systems

 **177**   
TAX FORMS FOR  
42 federal & state tax jurisdictions

 **51**   
OF THE TOP 100  
non profits

 **10**   
OF THE TOP 50  
private foundations

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