

WHO IS IT FOR

Private equity, venture capital, hedge funds, real property, and professional services firms that produce Schedule K-1s in volume.

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

- C-TRAC
- 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

126K+
INVESTMENTS
processed

31
OF THE TOP 100
institutional investors
in the country

26
OF THE TOP 100
university endowments

\$5.5+
TRILLION
of transaction value

15
OF THE TOP 25
accounting firms

7
OF THE TOP 40
health systems

177
TAX FORMS
for 42 federal & state tax jurisdictions

TOP
wealth management firms & law firms

8
OF THE TOP 100
private foundations &
family offices

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