

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



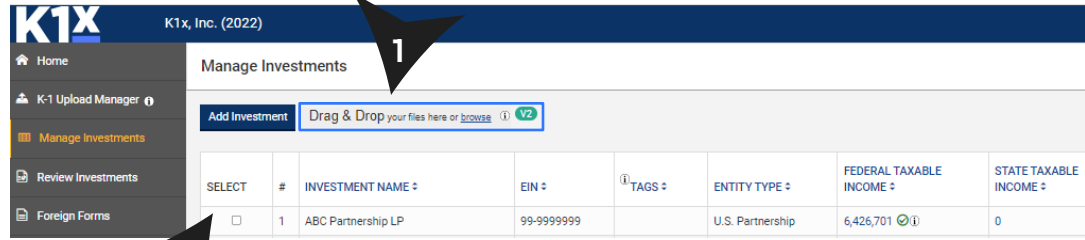
WHO IS IT FOR

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

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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