

WHO IT'S FOR

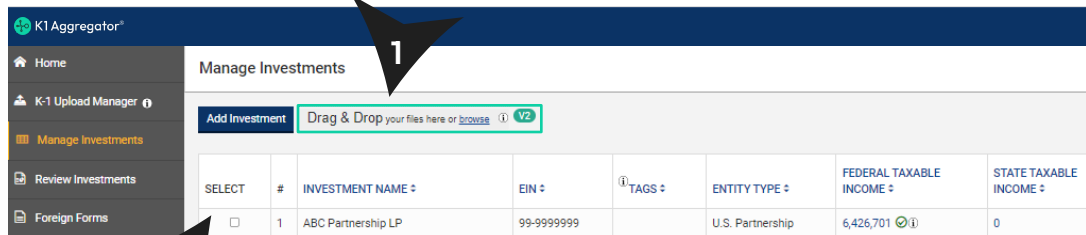
Accounting firms, institutional investors, banks, trusts, family offices, pensions, individuals, and corporations that receive Schedule K-1s in volume.

ABOUT

K-1 Aggregator® uses patented AI-powered automation to streamline tax compliance for Schedule K-1 recipients by offering:

- 100% digitization of extracted K-1 Form data with executive summary highlighting critical tax data elements
- Reading, aggregation, and analysis of federal & state taxable income, K-3 information & foreign reporting requirements
- Reduction of time, costs, & risks
- New Aggregator Plus™ upgrade automates 1099 data extraction too

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



2. Outputs:

- Receive a structured data table
- Excel-based data extraction summary
- Robust in-app analytics
- PDF or XML foreign forms
- At-a-glance view of extracted but unmapped K-1 data (including PDF page) helps you focus on exceptions
- Direct integrations to K-1x, WK and TR products

BENEFITS

11.18
Seconds to extract & aggregate

90%
Reduction in manual data handling

287%
ROI: Independent analysis by Genius Drive

Typical Benefits

For a composite org with:
500 forms & 20 Entities

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

\$135K
Annual Benefits

Additional Benefits



Eliminated data outsourcing needs & cost

~100%

Accuracy & 66% cycle time reduction achieved

100%

Control & transparency

2 MONTHS

To unlock value



Accounting staff engagement, retention & elevation



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

FEATURES

Automate K-1 data aggregation

- Automatically aggregates ALL state & federal K-1, K-3, & foreign disclosure data for portfolio-level review & reporting
- Provides state taxable income allocations for ALL 42 taxing jurisdictions
- Extracts the entirety of the state K-1 & provides this data in an easy-to-use grid that exports to excel for 10 states (15 forms)
- Automates 1099 data extraction with Aggregator Plus™ upgrade

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
- Tenant Level Master K-1 helps users conduct tax analysis across entire portfolio—all tax data elements viewable in one report

Integration with tax software

- K1x Import K-1/ K-3 data from K1 Aggregator into K1 Creator, 990 Tracker
- Wolters Kluwer: CCH Access Tax, Prosystem fx
- Thomson Reuters: ONESOURCE Income Tax, ONESOURCE Trust Tax, GoSystem Tax RS platforms (Including UBI Export to GoSystem RS for trust returns), Ultra Tax



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 8,000 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 8000 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.

VISIT US

FOLLOW US