

C-TRAC

SOFTWARE TO SIMPLIFY & STREAMLINE COMPLEX 990 EXEMPT REPORTING AND FILING REQUIREMENTS



WHO IS IT FOR

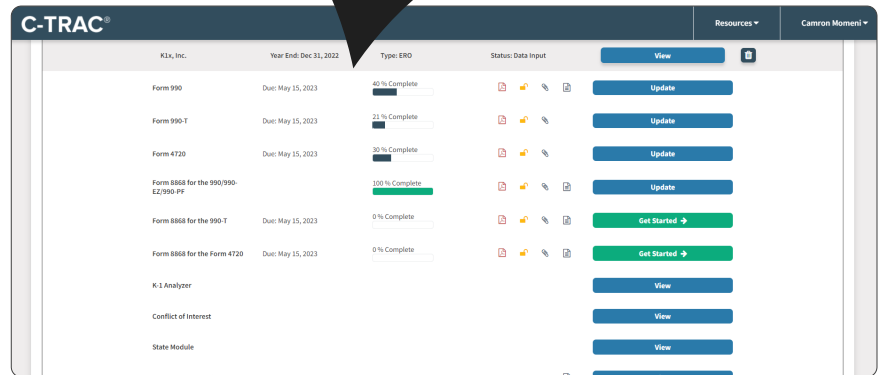
Tax exempt organizations including higher education institutions, private foundations, healthcare systems, pension trusts, and other not-for-profits that process 990s and K-1s in volume.

All your tax-exempt compliance reporting & filing needs in one platform including:

- All Federal Forms
- All State Forms
- Investment Management
- Master Compensation Reporting
- Conflicts of Interest
- K-1 Analyzer Integration

ABOUT

The first and most intuitive IRS-approved software designed specifically to streamline required information gathering, manage multiple aspects of tax-exempt compliance, and automate direct e-filing of completed forms.



BENEFITS

90%
Manual data entry elimination

311%
ROI: Independent analysis by Genius Drive

Typical Benefits

For a composite org with:
500 forms & 20 Entities

\$80K + **\$39K**
Form preparation productivity + Reduction in technical dept/homegrown systems

\$119K
Annual Benefits

Additional Benefits



Eliminated data outsourcing needs & cost

~100%

Accuracy & 66% cycle time reduction achieved

100%

Control & transparency

4 MOS

Payback within the first full cycle



Accounting staff engagement, retention & elevation



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

FEATURES

Automate data aggregation

- IRS approved tax preparation solution including federal and state e-filing options
- Easy-to-use platform for all federal and state filing requirements
- One-click integration with K-1 Analyzer
- Covers all federal and state forms commonly required to complete tax-exempt filing

Modular tools in a single platform

- Federal Forms Module to complete all federal exempt filings
- State Module to complete all 42 state taxing jurisdictions forms and extensions
- Master Compensation Module for organizations with compensation reporting across multiple entities
- K-1 Analyzer module and integration with Federal and State forms
- Conflict of Interest module to manage board questionnaires

IRS-Approved filing platform

- Federal 990, 990-PF, 990-EZ, 990-T, 4720, and 8868 e-file support
- Support for all 42 state taxing jurisdictions including corporate, exempt, and attorney general forms and extensions
 - State e-file support for 9 mandated e-file states

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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