

### WHO IS IT FOR

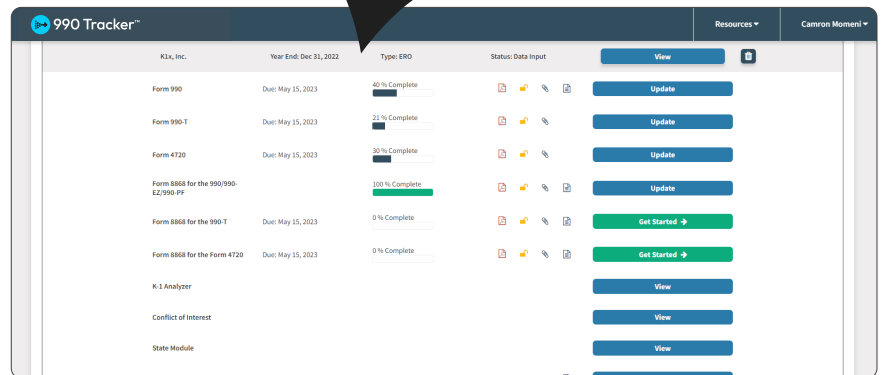
Tax exempt organizations including higher education institutions, private foundations, healthcare systems, pension trusts, and other not-for-profits that process 990s and K-1s in volume.

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

- All Federal Forms
- All State Forms
- Foreign Forms
- Investment Management
- Master Compensation Reporting
- Conflicts of Interest
- K-1 Aggregator 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%**  
Reduction in manual data handling

**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

**2 MONTHS**

To unlock value



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 Aggregator 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
- Supports forms for all 42 state taxing jurisdictions including corporate, exempt, and attorney general forms and extensions
- Now supporting more state e-files. 990 Tracker added 22% more forms and supports e-file for 20 jurisdictions



## ABOUT K1X, INC.

K1x is the leading data distribution platform for alternative investments. The fintech company's patented, 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 8000 organizations including

### KEY STATS

**11.18**

SECONDS OF DATA  
extraction per K-1

**42**

STATE & FEDERAL  
tax jurisdictions

**177**

TAX FORMS

### CLIENTS

**44**

OF THE TOP 100  
institutional investors

**15**

OF THE TOP 25  
accounting firms

**11**

OF THE TOP 100  
private foundations

**36**

OF THE TOP 100  
university endowments

**8**

OF THE TOP 40  
health systems

**51**

OF THE TOP 100  
non profits

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