

WHO IT'S FOR

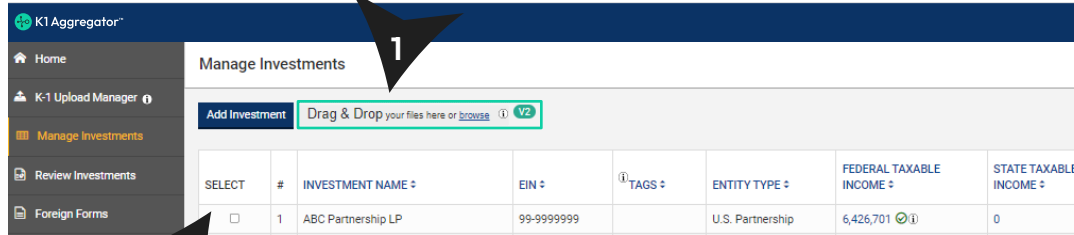
Accounting firms, institutional investors, banks, trusts, family offices, pensions, individuals, and corporations that receive Schedule K-1s in volume.

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

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 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

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)

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 K-1 Analyzer into K-1 Navigator, C-TRAC
- Wolters Kluwer:
CCH Axxess Tax
- Thomson Reuters:
ONESOURCE Income Tax, ONESOURCE Trust Tax, GoSystem Tax RS platforms (Including UBI Export to GoSystem RS for trust returns)



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

[VISIT US](#)

[FOLLOW US](#)