



### WHO IS IT FOR

Private equity, venture capital, hedge funds, real property, family offices, fund administrators and professional services firms that produce Schedule K-1s.

### ABOUT

This CPA-designed solution simplifies and shortens a manual, data-intensive, multi-step process into a streamlined, efficient workflow for your K-1 packages. You no longer need to struggle with overly complex and sometimes uncooperative tax software to make your K-1s look exactly the way you want them to look.

Category	Tax	Tax US Federal	Comparison
Beginning Balance	600,000	0	600,000
Capital Contributed During the Year	1,920,000	0	1,920,000
Current Net Income (Loss)	(11,302,100)	(10,207,700)	(1,094,400)
1. Ordinary Business Income (Loss)	3,000,000	2,116,100	883,900
2. Net rental real estate income (loss)	360,800	210,200	150,600
3. Other net rental income (loss)	37,100	66,000	(28,900)
4a. Guaranteed payments for services	0	0	0

### TYPICAL BENEFITS

For a composite org with:

**500**  
Forms

**20**  
Entities

**\$461K**  
Direct annual benefits

**32%**  
Manual data entry elimination

**325%**  
ROI: Independent analysis by Genius Drive



Eliminated data outsourcing needs & cost



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

**100%**

Control & transparency

**4 MOS**

Payback within the first full cycle



Accounting staff engagement, retention & elevation

### FEATURES

#### Complete K-1 production

- First-ever fully digital investor K-1 packages, including footnotes & white paper statement data
- Easy-to-use allocation functions allowing allocations against any value anywhere
- Complete K-1, K-3 & 42 state taxing jurisdictions' K-1 & equivalent data aggregated & allocated for the pass-through & end-recipient returns
- Instant PDF creation options & compatibility with existing portal providers

#### Investor communication portal

- Electronic delivery of K-1 packages, supporting documents, or other documents
- Data management and document tracking
- All-in-one communication system that facilitates data gathering and dissemination

#### Integration with tax software

- Thomson Reuters: *GoSystem Tax RS platforms*
- Wolters Kluwer: *CCH Access*



## 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 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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