

THE K1 AGGREGATOR® ADVANTAGE**PURPOSE-BUILT, PATENTED AI
ENGINE TRAINED ON MILLIONS
OF REAL K-1S SINCE 2010**

Dataset is ~95% of all "large partnership" complex K-1s. Uses proprietary, traceable models — never a black box.

VS

Primarily OCR with limited "out-of-the box" AI components.

**80% RICHER EXTRACTION CAPABILITIES**

Extracts ~98% of K-1 content—federal, all 42 states, K-3, whitepapers, footnotes for all entity types and pass-throughs.

VS

Most extract only 1040 K-1 forms—no line items or whitepapers.

**CONTEXT-AWARE COMPLIANCE**

AI auto-validates against IRS rules and aligns data with tax regs via smart UI and logic.

VS

No Tax Context. No Validating Interface. Just a Black Box.

**FLEXIBLE APIS WITH TAX, CRM, &
ACCOUNTING SYSTEMS**

Automates K-1 data flow—no manual entry, fully connected or decoupled as needed.

VS

Siloed Systems & Disconnected Data

**INSTANT, AI-DRIVEN INSIGHTS FOR
STRATEGIC PLANNING**

Generates review-ready docs, highlights planning opportunities, and turns every federal, SALT, and international data point into action.

VS

None known

**SOC 2 CERTIFIED AND 7216 COMPLIANT**

Uses proprietary closed LLMs—no generative AI—for secure, IRS-compliant, privacy-first data processing.

VS

Public templates

**CLIENT-DRIVEN INNOVATION SINCE 2010**

Constantly evolving with feedback, automation upgrades, and expanded extraction for 1099s, W-2s, and full 1040 workflows.

VS

Static products; outdated technologies

NEW! Optional automated 1099 data extraction today
and a full 1040 suite by the end of 2025

HOW WILL YOU USE YOUR EXTRA HOURS?**BEYOND THE FACE PAGE EXTRACT K-1 DATA FROM
PDF WHITEPAPERS, K-3, & ALL STATES! OPTIONAL
1099 DATA EXTRACTION UPGRADE**



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.

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