



Take control of your K-1 data, your K-1 process and K-1 deliverables.

## PRODUCE K-1S?

Automate and customize K1 creation with comprehensive collaborative tooling that provides accurate K-1s on demand, custom statements designed in a word-based editor, and flexible packing tools allowing for easy compilation and distribution.

- ✓ Accurate
- ✓ Efficient
- ✓ Fast

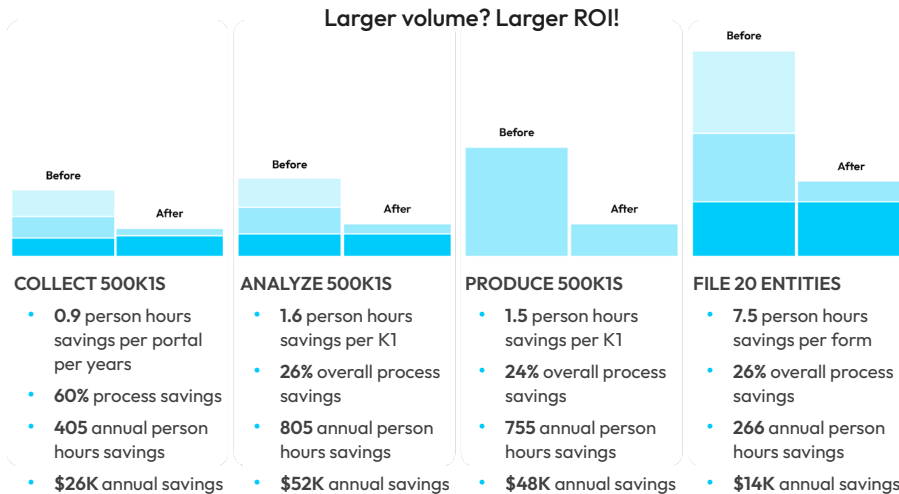
Delivery of federal, state and international taxing jurisdictions with a collaborative K-1 creation tool

## RECEIVE K-1S?

Awarding-winning, patented K-1 Aggregator<sup>®</sup> eliminates 90% of manual K-1 data entry. Just 11 seconds to accurately and automatically extract PDF K-1 data.

- ✓ Face page
- ✓ White papers
- ✓ State reporting
- ✓ K-3s

**K1X IS TRUSTED BY 85 OF THE TOP INSTITUTIONAL INVESTORS, 31 OF THE TOP CAPITAL & WEALTH MANAGERS, AND 20 OF THE TOP 25 ACCOUNTING FIRMS**



**Benefits**

- ~100%** Accuracy & 66% cycle time reduction achieved
- 2 WKS** To onboard \*Perfect timing for the 70% of K-1 that hit all at once
- Investor community experience w/timely reports & clear after-tax ROI

"We came away really impressed with the demo and overall value prop for handling K1's. I am excited to move forward."

VENTURE CAPITALIST

"This is something else entirely far beyond my expectations and my expectations are very high."

ACCOUNTING FIRM

"I used K1x at my former firm, and am so happy that we're introducing them to my firm now."

ACCOUNTING FIRM

**K1X DELIVERS**

- 90% less manual K-1 work
- Lower outsourcing costs
- Less compliance risk
- More collaboration
- More tax savings
- More control of data & insights
- More freedom to focus on strategic planning & growth



## ABOUT K1X, INC.

K1x is the leading data distribution platform for alternative investments tax compliance. 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. K1x is battle-tested by the best, and trusted by more than 8000 organizations including 44 of the 100 largest institutional investors in the US, 20 of the top 25 accounting firms, 11 of the top 100 private foundations, 45 of the top 100 university endowments, and 7 of the top 40 health systems.



# PROVEN RESULTS

Battle-tested by the best, K1x is trusted by more than 8000 clients

### 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

**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

**51**

OF THE TOP 100 non profits

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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