

## EXECUTIVE OVERVIEW

Manual K-1 workflows in Excel are error-prone, slow, and lack auditability. K1x Aggregator® automates full K-1 extraction—including federal, 42 states, footnotes, and K-3 data—integrates directly with CCH Access, and creates a centralized, secure audit trail.

## KEY COMPARISON

Feature	K1x Aggregator®	Excel-Based Workflow
DATA ENTRY	AI-powered extraction from PDFs	Manual entry from K-1 documents
ACCURACY	100% match to Excel export and tax software	Errors can propagate into returns undetected
AUDIT & REVIEW	Validation history and version control	No audit trail; error detection
INTEGRATION	Export to Excel + direct CCH Access API	Manual mapping and export
TIME SAVINGS	Up to 90% faster processing	30–60 minutes per K-1 per staff member
COMPLIANCE & SECURITY	SOC 2 Type II, centralized control	Spreadsheets scattered, version chaos

## BUILD VS. BUY

What the research says: Gartner shows in-house systems exceed budgets by 27%, with 1-in-6 overrunning by 200%. McKinsey found 45% of IT projects overspend and under-deliver. Add maintenance, updates, and hidden labor, and costs spike quickly.

## OPPORTUNITY & RISK

- Opportunity Cost: Homegrown systems tie up staff who could focus on billable work.
- Key-Person Risk: If the owner of the system leaves, knowledge loss disrupts operations.

## FREEING CAPACITY FOR ADVISORY

- A CPA.com survey found 68% of clients want strategic consulting services, and 29% say it's their greatest unmet need—especially around tax planning.
- By automating time-consuming manual K-1 work, K1x frees up capacity for high-margin advisory services like forecasting, planning, and strategic reviews.

## FINAL MESSAGE

K1x Aggregator® eliminates hidden costs, time burdens, and staffing risk tied to internal systems— while freeing up staff to deliver strategic advisory services. It's faster, more scalable, and delivers better ROI than building in-house.

HOW WILL YOU USE YOUR EXTRA HOURS?

BEYOND THE FACE PAGE EXTRACT K-1  
DATA FROM PDF WHITEPAPERS, K-3,  
& ALL STATES!



## ABOUT K1X, INC.

A Fast Company "Most Innovative Companies 2025" honoree, K1x is the leading data distribution platform for alternative investment tax compliance as well as the industry standard, IRS-certified solution for seamless tax-exempt filings. The fintech company's patented, AI-powered SaaS solution digitizes and distributes tax data seamlessly—connecting investors, accounting firms, tax software, IRS and state taxing authorities—simplifying complex processes, accelerating filings, reducing costs, and delivering greater control and accessibility. K1x is battle-tested by the best, and trusted by more than 8000 organizations including 44 of 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



## 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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