



K-1 Software for Family Funds

MODERN, CLOUD-BASED AI TAX TECHNOLOGY

COLLABORATE WITH YOUR ACCOUNTANT TO
PROCESS K-1'S, 1099s, AND W-2s ON DEMAND



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[®] 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

K1X DELIVERS

Data on-demand

Data connectivity to other systems & processes

Automatic allocation & taxable income
visibility through multiple tiers

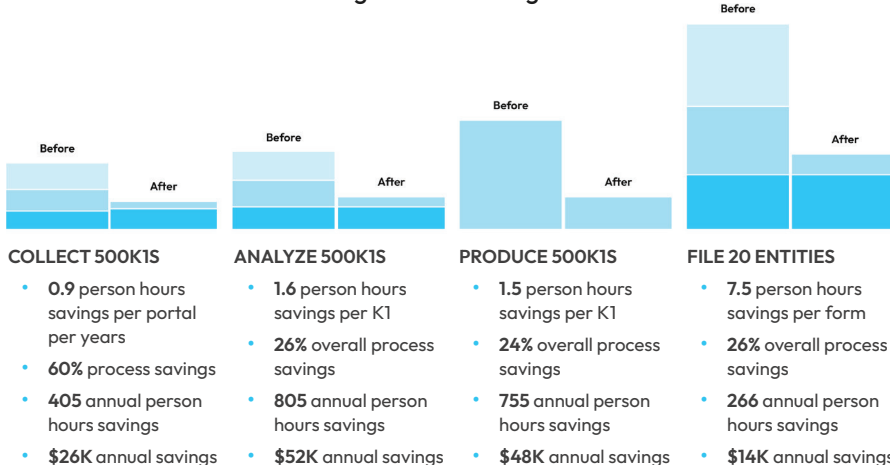
Ownership of work

In-depth reporting & analysis across the
entire family office structure

After-tax ROI analysis

Modernization + Scale

Larger volume? Larger ROI!



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

"The countless hours saved combined with the very high accuracy gave us more time to analyze the numbers on the page, rather than just enter them. We have more time to think since we are less 'number numb'. This is tremendous technology at a price point that smaller family offices can afford. A game changer."



RYAN REDMOND
CPA TAX MANAGER AT DRAFTCO & ASSOCIATES INC.

"K1x was a huge help pulling in information because it took data entry off us. We love its ability to move data from one K-1 line item to another — this eliminates the hassles with reclassification and eliminated data entry work. Now we have drag and drop and integration with important third-party software. I think everybody should use this!"



FAMILY OFFICE MANAGER



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 40,000 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 40,000 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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