Evolve Your Capability

Your Best People Are Doing Your Worst Work

What Is the Real Cost of Your Most Valuable People Doing Your Least Valuable Work?

Across the tax industry, the same story keeps repeating. The senior advisor who should be shaping a client's succession plan is instead reconciling a spreadsheet. The partner capable of leading a complex planning conversation is chasing down a missing K-1. The people with the deepest expertise spend their days on work a well-designed system should be doing automatically.

It is not a skills problem. It is not a capacity problem. This is a **workflow problem** — and it's quietly limiting how far your firm can grow.

THE MATH DOESN'T WORK ANYMORE

More than half the working day is lost to manual data handling, status-chasing, and rework. That's time your firm isn't spending on planning, advisory, or the strategic conversations that deepen client relationships.

To compete, your operation must scale volume without scaling headcount. But workflows built for yesterday's complexity are breaking under today's pressures.

56%

of time is spent on reactive, low-value tasks

THE HIGHEST-VALUE WORK KEEPS LOSING TO THE LOWEST-VALUE WORK

Planning conversations. Advisory relationships. Strategic guidance that builds trust and commands premium fees. This is the work that drives a practice and it keeps getting displaced by manual data handling that any well-designed system should be doing automatically without scaling headcount. But workflows built for yesterday's complexity are breaking under today's pressures.

WHAT GETS DISPLACED	WHAT DISPLACES IT
Planning conversations	Chasing missing data
Advisory relationships	Manual reconciliation
Strategic guidance	Status-checking and follow-up
Premium-fee work	Copy-paste and rework

An Extraction-Only Tool Is a Self-Limiting Decision

It's tempting to buy the narrowest fix: a tool that pulls data off a K-1 and stops there. Or worse, a vendor-locked extraction tool that hands you output you can't move, combine, or build on.

Say no to self-limiting. Say yes to unlocking possibilities.

The same structured tax data that satisfies compliance can become the foundation for fund performance insight, after-tax ROI analysis, tax planning opportunities, and anomaly detection — the raw material for the advisory conversations your team never has time to find manually.

DATA THAT WORKS ONCE VS. DATA THAT WORKS FOR YOU ALL YEAR

Extraction-only tools finish the moment compliance is done. A strategic data asset keeps generating value long after the filing deadline passes.

THE MARKET IS HANDING YOU THE OPPORTUNITY — IF YOUR WORKFLOW CAN TAKE IT

Private markets aren't a niche anymore, they're becoming the mainstream. More capital, more investors and more complexity is flowing into the K-1 pipeline every year. Firms that can absorb that volume without a proportional increase in headcount will capture the growth. Firms still bottlenecked by manual workflows will simply be outrun by it.

10%+

Projected annual private markets AUM growth through 2028

70M

401(k) participants now being opened to alternatives

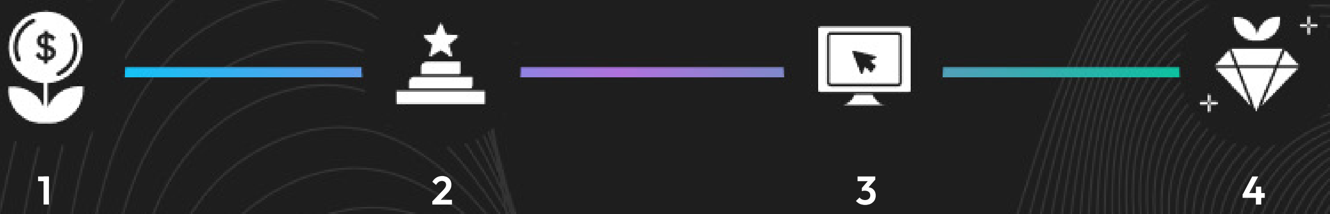
Evolve Capability. Then Keep Evolving.

Turning tax data into a strategic asset isn't a one-time fix — it's one of three shifts firms need to make to compete in what's coming.

Ready to see what evolved capability unlocks for your firm?

TALK TO K1X

Turn Tax Data Into a Strategic Asset — and Watch What It Unlocks



1. **GROW REVENUE**
   More insight and more differentiated services command higher fees.
2. **EXPAND SERVICE OFFERINGS**
   The same structured data that powers compliance becomes the foundation for planning, ROI analysis, and advisory work.
3. **BUILD NEW PRACTICES**
   Capacity you didn’t have before becomes a new line of business, not just faster compliance.
4. **SCALE WITHOUT SCALING HEADCOUNT**
   Deliver more value without a proportional increase in cost or people.

This is the chance to unleash your superpowers — to finally do the strategy, planning, analysis, advisory, and growth work you went to school for.

About K1x, Inc.

K1x is the purpose-built platform for private market K-1 intelligence — the system of record that accounting firms, family offices, funds, and tax-exempt organizations use to aggregate, extract, produce, and distribute K-1 data with accuracy, compliance, and scale no general tool can match.

GET STARTED EVOLVING PRIVATE MARKET TAX