



Smart decisions. Lasting value.™

Reducing your investment in tax compliance

Crowe K-1 solution for insurance

crowe.com

Technology specially designed for your industry

Crowe tax specialists have developed the Crowe K-1 solution for insurance to streamline the voluminous tax compliance reporting associated with alternative investments and to help you reduce time, costs, and risks. The solution helps organizations navigate and analyze complex issues such as federal and state taxable income, apportionment, and foreign reporting requirements.

With aggregation and extensive reporting capabilities, the Crowe K-1 solution for insurance allows you to see your information in ways not possible with standard industry tools. It can be used along with Crowe professional tax services or as a stand-alone license tool.

The Crowe K-1 solution has aggregated more than 9,000 K-1s representing more than \$85 billion in capital to date. Hundreds of organizations and thousands of users have chosen the Crowe K-1 solution for their tax compliance needs.



Learn more

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The Crowe K-1 solution for insurance is web-based and easy to use.

Key features of the module include:

- **Straightforward data entry –**
Intuitive data entry screens enable you to follow the layout of the forms.
- **Dashboard view of the investment portfolio –** Search, sort, and filter investments by taxable income, custom groups, name, EIN, or entity type.
- **Review and tracking tools –**
Dashboard fields help you track and manage K-1 receipts, investment input, add notes or questions, and review and update investment statuses.
- **Aggregate view of the investment portfolio –** View each line item of the K-1, state information, and foreign information at the individual investment level and portfolio level.
- **Data integrity and accuracy –**
The solution provides checks and balances, automated calculations to promote accuracy, and data security as a hosted solution.
- **Comprehensive reporting –**
There are more than 20 customizable reports that can be utilized for analytics, reviews, or detailed tax support.
- **Aggregation and preparation of foreign forms –** The system will automatically match foreign contributions across investments to help you determine if you have foreign filing requirements (via forms 926, 5471, 8865, 8886, and 8621).
- **Time-saving features –**
Take advantage of data imports and exports as well as rollover information each year.