

GruntWorx Solutions Overview

There are a few updates to the GruntWorx product lineup this tax season:

- **GruntWorxLITE** is now **GruntWorx CORE**
- **GruntWorx VERIFIED** is now **GruntWorx PREMIUM**
- Both still have access to the **Organize, Populate and Trades** features

New this tax season: We are currently working to include **AI-enhanced OCR** in both **CORE** and **PREMIUM** to improve data extraction accuracy.

GruntWorx® CORE

GruntWorx CORE is a **software-only solution** that automates data extraction and document organization. Firms and their staff perform all data verification and corrections using the GruntWorx review app. AI-enhanced OCR can reduce manual corrections, but final accuracy and turnaround depend on firm review processes and document complexity.

CORE is well suited for firms that have staff capacity to manage verification internally and want automation support without external validation.

GruntWorx® PREMIUM

GruntWorx PREMIUM combines automation with **U.S.-based professional review**. GruntWorx staff verify and correct extracted data against source documents before populating supported tax software, reducing internal reviewer workload and improving consistency across returns.

PREMIUM is designed for firms seeking **validated results, predictable turnaround, and reduced internal review effort**.

Pricing Models

Return-Based Pricing:

Available for **CORE** and **PREMIUM**, Return-Based Pricing offers a flat cost per return for greater budget predictability. Firms may purchase individual returns or discounted bundles. This model includes:

- Unlimited Document Uploads
- Up to four resubmissions per client, per tax year

Variable Pricing:

Available for **PREMIUM only**, Variable Pricing allows firms to pay based on pages, forms, and brokerages processed. This model does not include unlimited uploads or resubmissions.



GruntWorx®
K-1 ADVANCED
powered by **K1x**

GruntWorx also offers a **standalone solution** for advanced Schedule K-1 and K-3 processing. Available under Return-Based Pricing, **GruntWorx K-1 ADVANCED**, powered by patented AI technology from **K1x**, delivers structured, review-ready K-1 data designed to replace manual spreadsheet workflows.

While CORE and PREMIUM provide limited K-1 data processing, K-1 ADVANCED automatically digitizes complete K-1 data, including footnotes, allocations, and federal, state, and foreign reporting fields.

Key capabilities include:

- High-volume K-1 and K-3 data extraction
- Standardized exports to Excel, CSV, API, and other formats
- Detailed income allocations across all 42 taxing jurisdictions
- Built-in filtering and reporting for portfolio-level analysis and risk review

K-1 ADVANCED is intended for firms managing complex or high-volume K-1 workloads that require scalable, enterprise-grade data handling.