



TIERS AI

Partnership Tax Automation for the AI Era

Delivering AI-led Productivity Gains in Partnership Tax Compliance and Prospective Analysis

We have spent 25 years building partnership tax systems that power billions in recurring fees. Today, we bring that expertise into the AI era.

TIERS AI is an end-to-end, AI-native platform designed specifically for the complexity of tiered investment structures. We handle the heavy lifting of the tax lifecycle, from the moment you ingest a K-1 or PBC, through intricate book-to-tax adjustments, basis tracking, and tiered allocations, all the way to the final 1065 XML e-file.

We automate the tedious and the difficult, freeing you to focus on what matters: prospective analysis and client delivery

At its core, TIERS unifies two powerful engines:

- **An AI Operator** that understands your goals, composes workflows on demand, and explains every result in plain English.
- **A Hardened, Deterministic Calculation Engine** that produces the exact same answer every time from the same inputs, at any scale.

Every edit is tracked. Every calculation is reproducible. Every output is examination-ready.

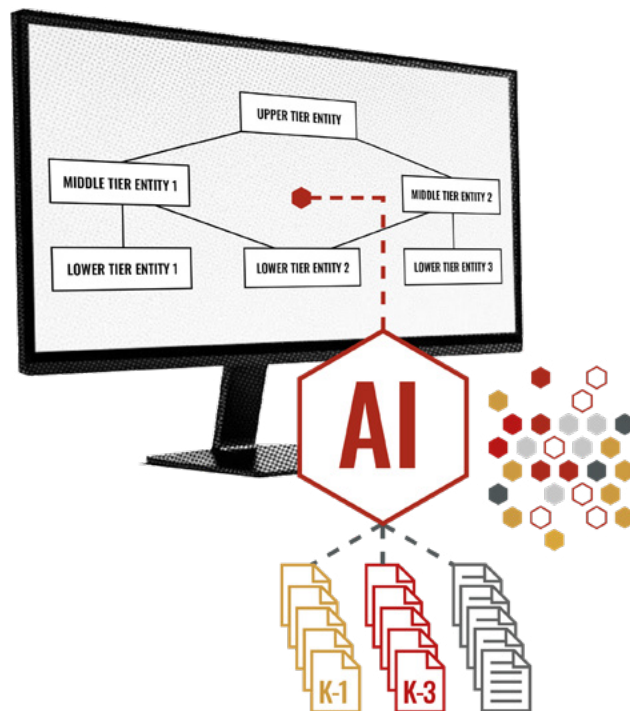
When you ask “Why?,” you get a precise answer backed by the Internal Revenue Code, regulations, specifications, and system source code.

PARTNERSHIP TAXATION CHALLENGES

Complexity is accelerating. Modern tiered partnership structures – with federal, state, and international reporting obligations – have outgrown fragmented legacy systems and labor-intensive processes. Adjustments, workarounds, and manual reconciliations become more expensive every year.

Economics have shifted. AI-native platforms can now reliably carry work that historically required large teams and brittle spreadsheets. Advantage will accrue to firms that adopt AI and re-design their processes around it. Cost structures are already diverging between early movers and those who wait.

Market position compounds. Firms that deliver faster turnaround and cleaner results at lower cost win work competitors can’t handle. Once established, those advantages are difficult to reverse. TIERS is built specifically for this environment.



WHAT MAKES TIERS DIFFERENT

Traditional tax systems require each workflow to be pre-programmed. If you want something new, you open a project, write a specification, engage a development team, and hope for a successful release.

TIERS works differently: you ask for outcomes; the operator composes the workflows.

You can ask for:

- Pro-forma K-1 and footnote packages
- Multi-state reporting analysis
- Allocation and tiering diagnostics
- K-1 / K-3 document analysis + reconciliation
- Comparative, Year to Year or Run to Run, 1065 e-file XML analysis





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How TIERS Works

AI OPERATOR

- Understands your goals and composes the workflows to achieve them
- Ask “why” on any calculation for instant provenance and logic
- Update, retrieve, and analyze data using natural language requests
- Design and share reusable workflows to ingest external data sources
- Produce diagnostics (K-1 to K-3 reconciliation, activity summaries)
- Propose fixes with tests when issues arise

CALCULATION ENGINE

- Federal, state, and international coverage (allocations, apportionment, SSI, composites, payments)
- Deterministic allocations with controlled rounding and plugging
- Single-pass calculation from lowest entities to top tier

OUTPUT & REVIEW

- Complete investor packages: K-1, footnotes, state reporting, K-3
- Full Excel and CSV exports plus new AI-native formats (.MD, YAML)
- Project history, instant restore, org charts, dashboards, self-service pivot and tabular views

THE TIERS ADVANTAGE

TIERS is built by a multi-disciplinary engineering team that has spent 25 years solving complex partnership tax problems at the largest scale. Our systems power partnership tax compliance at leading firms and service over \$2 billion in recurring annual fees. We have delivered and supported platforms for global practices that run thousands of engagements and serve marquee asset managers. The TIERS platform uses **advanced AI processes coupled with reliable, deterministic computation**. TIERS maintains complete knowledge of its own specifications, source code, inputs, outputs, and runtime environment. It handles the structures that break legacy systems, delivers audit-ready results under deadline pressure, and removes the manual reconciliation work that eats margins.

Learn more at crimsontreesoftware.com/tiers

DEPLOYMENT & INTEGRATION

- Azure single-tenant (client-managed preferred) for security control
- Direct Excel|CSV|PowerBI|Alteryx exports without proprietary lock-in
- Runs alongside tax software (Thomson Reuters, Wolters Kluwer) for phased migrations
- API access for custom integrations with upstream and downstream systems

USE CASES

TIERS is most effective where complexity, volume, or review risk overwhelm legacy approaches:

- Large tiered structures – Engagements with 100+ entities, where current tools and processes are the bottleneck.
- Complex allocation methods – Structures where allocation depends on point of origin and tiering paths, and where legacy systems struggle or fail.
- Multi-state compliance – Engagements with complex apportionment, SSI calculations, composite filings, and withholding, where manual work creates review delays and error risk.
- High-stakes transparency – Engagements requiring full change tracking and explainable calculations to support internal review, external examination, and client inquiries.

By the Numbers



\$2 BILLION+ **25 YEARS**
in recurring fees serviced of partnership
tax expertise

TIERS is how we apply that experience to the AI era: an AI-native operator on top of a hardened, deterministic core, purpose-built for modern partnership tax.

