



PARTNERSHIP TAX PLATFORM

# The AI-native operating system for *multi-tier partnership tax*.

Tax return preparation, partner allocations, and K-1 production on a connected database, not a stack of workbooks, with AI throughout.

● CURRENT CAPABILITIES

CONVERSATIONAL SURFACE

**AI Assistant — Cade**

A conversational interface that drives the entire workflow, end-to-end. Ask questions, import documents, review allocations, generate reports — through one conversation. New users are productive from day one.

ENGAGEMENT SETUP

**AI-Guided Onboarding**

Upload prior-year tax returns, PBC workpapers, and partnership agreements. Cascade reads them, configures the engagement, and builds the current-year starting point.

COMPUTATION

**Tax Allocation Engine**

Full allocation modeling: pro-rata, target capital, waterfall/promote. Partner capital accounts with book, tax, and 704(b) basis tracking.

DATA MODEL

**Partner Registry**

Single source of truth for investor demographics across the fund family. Change partner information once; it updates throughout Cascade

OUTPUT

**Reporting Suite**

Full 1065 workpaper set with traceability to source documents. Excel exports with live formulas and interlinked schedules.

INGESTION

**Workpaper Import**

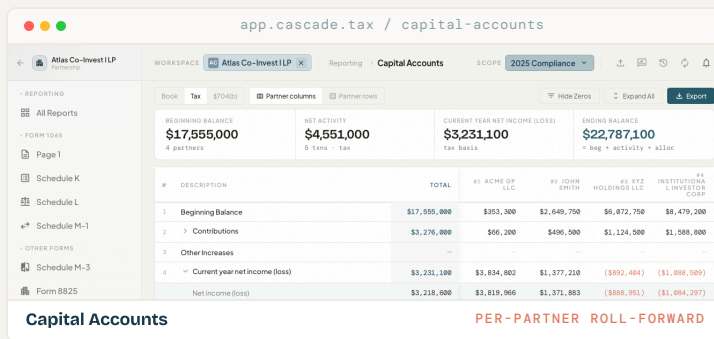
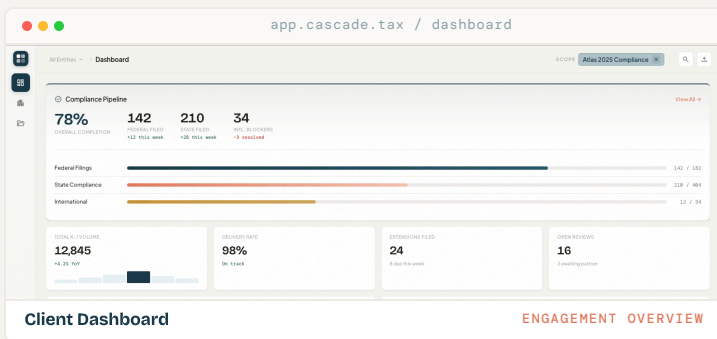
Source document upload with AI-assisted account classification and mapping to 1065 forms (M-3, 1065 Page 1, 8825, Schedule L, K-1s). Practitioner confirmation at each step.

SOURCE FILES

**Document Workspace**

Source file management with auto-generated reference codes and reprocessing workflow. Every figure traces back to its origin document.

● INSIDE THE PLATFORM



**Built to standardize firmwide processes and deliverables**

For acquisitive firms, new practices arrive with their own templates, technology, and habits. Cascade standardizes workpapers from any source or format — custom Excel, legacy software, paper, PDF — enabling day one integration and one firmwide brand.

WHO BUILT IT

Partnership tax veterans who've spent their careers building and using the platforms the largest firms run on. Now bringing that work to the rest of the market — engineered to the same standard as the best proprietary tooling.

*Built by practitioners, for practitioners.*

BUILT FOR

Accounting firms with complex partnership practices: real estate funds, private equity, family office, venture capital, multi-entity tiering.