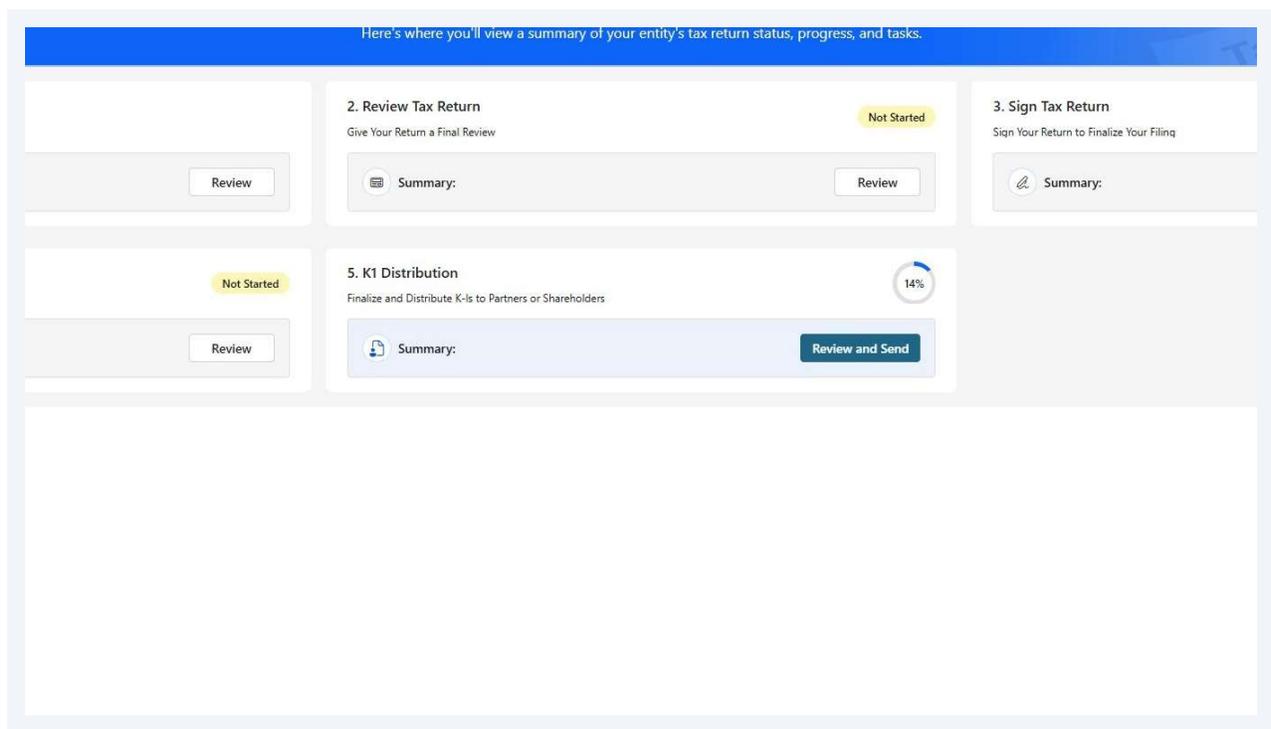


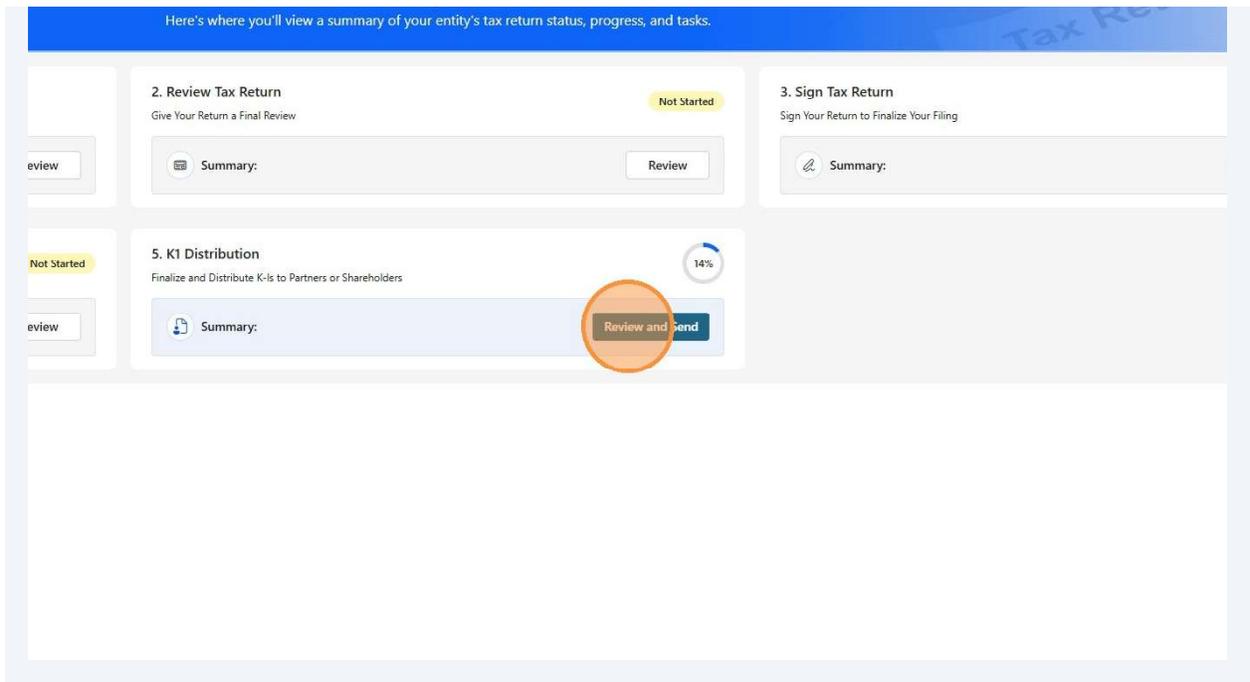
How To Send Schedule K-1 To Recipients

HubSync makes it easy to securely distribute Schedule K-1 forms to partners or shareholders. The quick guide below provides a step-by-step walk through on how to enter recipient email addresses and send K-1s directly from the platform.

1. Login to HubSync and open entity workspace.



2. Click “Review and Send” for the K1 Distribution step.



3. Input email address for each partner or shareholder.

If email address needs to be updated at any time, edit it directly within the K-1 Distribution grid. Each recipient may only have one email address associated with their record.

K-1 Distribution 14%

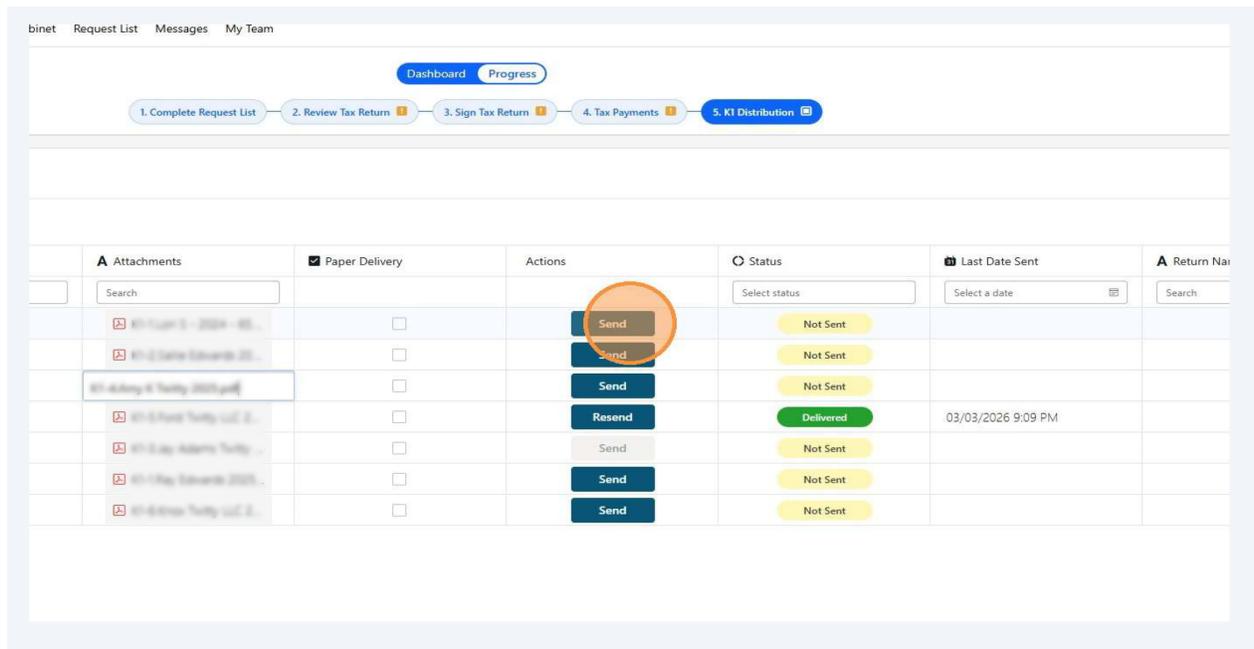
1. Complete Request List 2. Review Tax Return 3. Sign Tax Return 4. Tax Payments 5.

Search Export

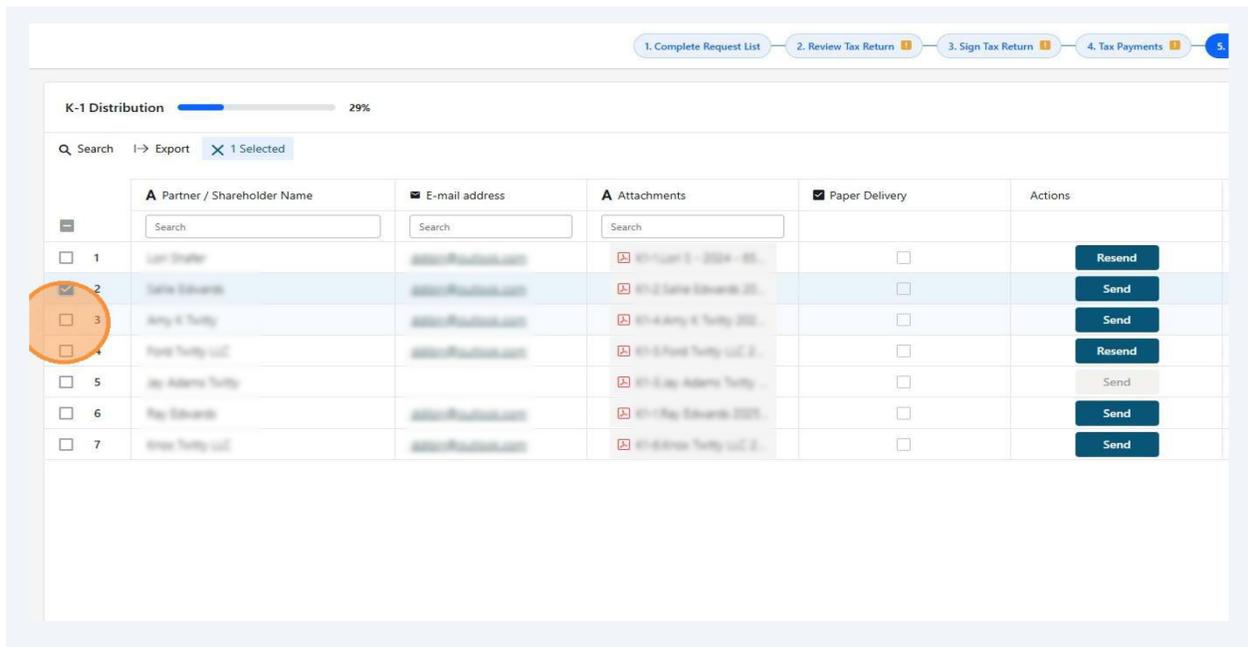
	A Partner / Shareholder Name	E-mail address	A Attachments	Paper Delivery	Actions
<input type="checkbox"/>	Search	Search	Search		
<input type="checkbox"/>	1 John Smith	john.smith@abc.com	2019 Form 1099-DIV	<input type="checkbox"/>	Send
<input type="checkbox"/>	2 Jane Doe	jane.doe@def.com	2019 Form 1099-DIV	<input type="checkbox"/>	Send
<input type="checkbox"/>	3 John & Tracy	john.tracy@ghi.com	2019 Form 1099-DIV	<input type="checkbox"/>	Send
<input type="checkbox"/>	4 John Tracy LLC	john.tracy@jtl.com	2019 Form 1099-DIV	<input type="checkbox"/>	Resend
<input type="checkbox"/>	5 John Adams Tracy	john.adams.tracy@jatl.com	2019 Form 1099-DIV	<input type="checkbox"/>	Send
<input type="checkbox"/>	6 John Adams	john.adams@k.com	2019 Form 1099-DIV	<input type="checkbox"/>	Send
<input type="checkbox"/>	7 John Tracy LLC	john.tracy@l.com	2019 Form 1099-DIV	<input type="checkbox"/>	Send

Important Note: K-1 distribution is controlled by the client user. CRI users are not able to send Schedule K-1s, and forms are distributed only when the external user selects Send for all K-1s.

4. External user clicks “Send” for each partner or shareholder to receive their Schedule K-1.



5. Alternatively, select multiple or all recipients from the list.



6. After selecting multiple recipients, click “Send to Selected”.

The screenshot shows the 'K-1 Distribution' progress bar at the top, with the current step being '5. K1 Distribution'. Below the progress bar, there is a 'Send to Selected' button circled in orange. The main table displays a list of recipients with columns for Paper Delivery, Actions, Status, Last Date Sent, and Return Name.

	<input checked="" type="checkbox"/> Paper Delivery	Actions	Status	Last Date Sent	Return Name
- 65...	<input type="checkbox"/>	Resend	Delivered	03/03/2026 9:10 PM	
Is 20...	<input type="checkbox"/>	Send	Not Sent		
· 202...	<input type="checkbox"/>	Send	Not Sent		
LC 2...	<input type="checkbox"/>	Resend	Delivered	03/03/2026 9:09 PM	
witty ...	<input type="checkbox"/>	Send	Not Sent		
2025...	<input type="checkbox"/>	Send	Not Sent		
LC 2...	<input type="checkbox"/>	Send	Not Sent		

7. If the recipient requests a paper copy of the form, Paper Delivery column should have a checkmark in the box for that recipient.

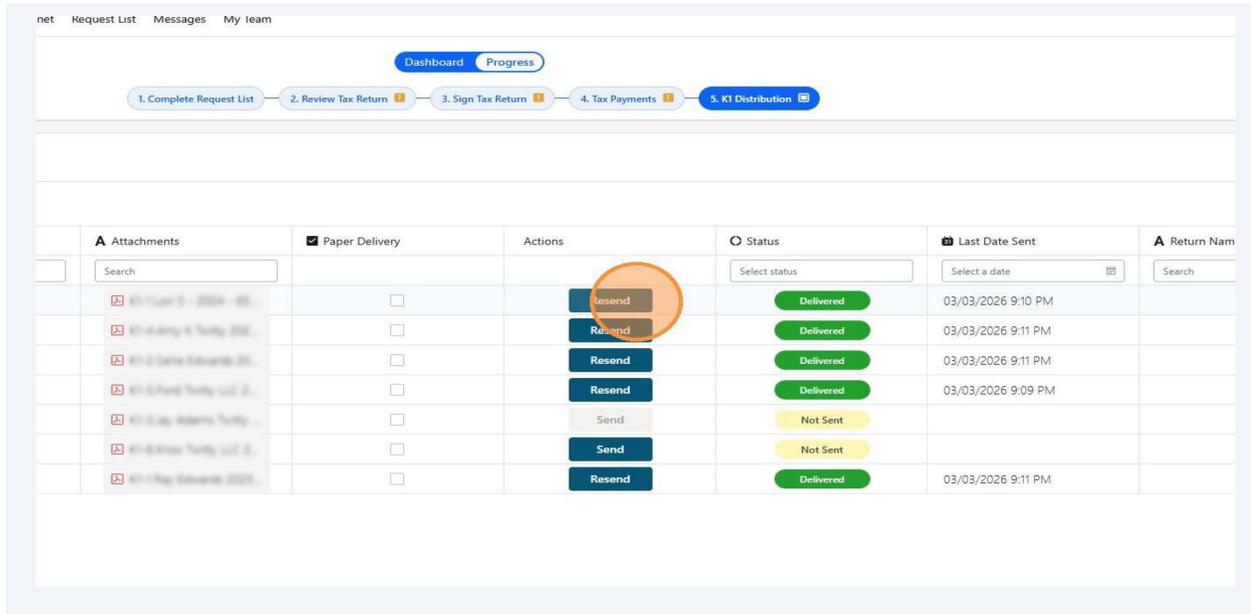
If Paper Delivery recipient provides an email later, Paper Delivery box may be unchecked and email address field updated with an email provided.

The screenshot shows the 'K-1 Distribution' progress bar at the top, with the current step being 'K-1 Distribution' and a progress indicator at 86%. Below the progress bar, there is a 'Send to Selected' button. The main table displays a list of recipients with columns for Partner / Shareholder Name, E-mail address, Attachments, Paper Delivery, Actions, Status, and Last Date Sent.

	Partner / Shareholder Name	E-mail address	Attachments	Paper Delivery	Actions	Status	Last Date Sent
<input type="checkbox"/>	Search	Search	Search			Select status	Select a date
<input type="checkbox"/>	1	John Smith	1 K-1 Form 1099-DIV	<input type="checkbox"/>	Resend	Delivered	03/03/2026 9:11 PM
<input type="checkbox"/>	2	John Smith	1 K-1 Form 1099-DIV	<input type="checkbox"/>	Resend	Delivered	03/03/2026 9:11 PM
<input type="checkbox"/>	3	John Smith	1 K-1 Form 1099-DIV	<input type="checkbox"/>	Resend	Delivered	03/03/2026 9:11 PM
<input type="checkbox"/>	4	John Smith	1 K-1 Form 1099-DIV	<input type="checkbox"/>	Resend	Delivered	03/03/2026 9:09 PM
<input type="checkbox"/>	5	John Smith	1 K-1 Form 1099-DIV	<input checked="" type="checkbox"/>		Paper Delivery	
<input type="checkbox"/>	6	John Smith	1 K-1 Form 1099-DIV	<input type="checkbox"/>	Send	Not Sent	
<input type="checkbox"/>	7	John Smith	1 K-1 Form 1099-DIV	<input type="checkbox"/>	Resend	Delivered	03/03/2026 9:11 PM

8. If any of the members request for the K-1 to be resent, click “Resend” button.

Note the “Last Date Sent” column updates automatically each time a Schedule K-1 is sent to that recipient.



The screenshot shows a software interface with a progress bar at the top indicating the current step is '5. K1 Distribution'. Below the progress bar is a table with the following columns: Attachments, Paper Delivery, Actions, Status, Last Date Sent, and Return Name. The table contains several rows of data, each representing a K-1 distribution record. The 'Actions' column contains buttons labeled 'Resend' or 'Send'. The 'Status' column contains labels like 'Delivered' or 'Not Sent'. The 'Last Date Sent' column contains dates and times. A red circle highlights the 'Resend' button in the first row.

Attachments	Paper Delivery	Actions	Status	Last Date Sent	Return Name
K-1 Form 990-SS 2024 - 05	<input type="checkbox"/>	Resend	Delivered	03/03/2026 9:10 PM	
K-1 Advisory K Turley 2024	<input type="checkbox"/>	Resend	Delivered	03/03/2026 9:11 PM	
K-1 2 Capin Crouse 2024	<input type="checkbox"/>	Resend	Delivered	03/03/2026 9:11 PM	
K-1 2 Ford Turley LLC 2024	<input type="checkbox"/>	Resend	Delivered	03/03/2026 9:09 PM	
K-1 2 Capin Adams Turley 2024	<input type="checkbox"/>	Send	Not Sent		
K-1 2 Capin Turley LLC 2024	<input type="checkbox"/>	Send	Not Sent		
K-1 2 Capin Edwards 2024	<input type="checkbox"/>	Resend	Delivered	03/03/2026 9:11 PM	

? Questions

If you have any questions about sending your Schedule K-1s through HubSync or need assistance with the distribution process, please contact our team. We are happy to help ensure your K-1s are delivered securely and efficiently.

†This is not a CPA firm.

*Assurance, attest, and audit services provided by Carr, Riggs & Ingram, L.L.C.

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