

Powering the Future of Connected Wealth

BetaNXT is dedicated to creating the wealth management experience of tomorrow. We provide operational product solutions and innovative data-as-a-service capabilities to retail and institutional wealth firms, funds, and issuers to support and streamline advisor and investor workflows.

A unified data architecture that powers connectivity

Flexible, modular solutions to support and connect the full wealth ecosystem

A resilient system, maintained for 100% availability

Efficient integrations to reduce resource and cost strain

Advisor tools to drive curated investor outcomes

BetaNXT offers a comprehensive, end-to-end advisor and investor experience. We offer connected, highly curated data structures, user-centric technology, and a robust partner network that provides seamless integrations for our enterprise clients.

Securities processing and custody operations

- Clearance and Settlement
- Accounting and Back Office Operations
- Order Management and Trading Technology
- Advisor and Investor Portal
- Account Opening
- Operations-as-a-Service
- Security Master

End-to-end tax reporting solution

- Cost Basis Reporting
- Tax Information Reporting
- Managed Services
- Tax Optimization

Investor communications and shareholder engagement

- Pre-sale and Post-sale Communications
- Proxy Distribution (Digital and Print) and Tabulation
- Ongoing Regulatory Reports
- Corporate Actions, Class Action, and Bankruptcy Notifications
- Statements and Confirms, ADVs, and Other Communications
- SRD II Proxy Voting and Disclosure Service

Advantages of working with us:

- ✓ Flexible solutions that provide end-to-end visibility and mitigate operational risk
- ✓ Integrated data and workflows across the BetaNXT platform
- ✓ API enabled with 600+ industry utility and third-party integrations
- ✓ Digital-first capabilities for the entire investor experience
- ✓ Dedicated customer service and support