

Delivering Your End-to-End Tax Solutions

Combining proven technology, robust processes, exceptional data accuracy, and decades of experience, BetaNXT automates the operational burden of tax reporting and cost basis accounting, fulfilling regulatory requirements. This enables our clients to focus on their advisors and the investors they serve.

BetaNXT delivers a four-pronged approach: cost basis reporting, tax information reporting, tax optimization, and managed services. These components can be delivered as a holistic unit or individually as standalone offerings and can be supplemented with managed services to streamline processes.



Cost Basis Reporting

- Back-office agnostic, technology-friendly solution
- Highly automated and easily integrates with our clients' platforms
- Provides trusted cost basis reporting and compliance to more than 100 broker and advisor firms



Tax Information Reporting

- Agnostic to back office and cost basis reporting solution
- Increases accuracy and reduces corrections to deliver a superior client experience
- Reduces the resources needed to support tax season operations



Tax Optimization

- Combines cost basis data and advanced portfolio analytics to deliver a better client experience
- Transparency into client portfolios enhances the client/advisor relationship
- Value-added insights help gather assets and protect and grow AUM



Managed Services

- Reconciliation services for cost basis and tax reporting
- Tax information reporting operations
- Streamlined business operations support