



## BetaNXT and CAIS Partner to Unlock Alternatives at Scale Across the BetaNXT Network

*Partnership gives firms in the BetaNXT network access to CAIS alternatives capabilities, helping streamline trade and post-trade workflows*

**New York — July 7, 2026** — [BetaNXT](#), a leading provider of wealth management technology solutions with real-time data capabilities and advanced AI innovation, and [CAIS](#), the leading alternative investment platform for financial advisors, today announced a strategic partnership that connects BetaNXT network firms to CAIS' alternatives capabilities across the full trade lifecycle, improving access to alternatives and streamlining workflows within firms' existing operating models.

Through the partnership, advisors gain more automated workflows across the full alternatives lifecycle, from subscription documents and capital calls through trade processing, confirmations, settlements, and position reporting. By combining CAIS' alternatives platform capabilities with BetaNXT's real-time data capabilities, the partnership reduces the operational burden that has historically made alternatives difficult to scale at the firm level.

"As demand for alternative investments continues to grow, firms need technology that makes access easier and operations more efficient," said **Tim Rutka, President of Beta, a BetaNXT business**. "Our partnership with CAIS strengthens our ability to support alternatives as part of a broader connected wealth experience and strengthens the value we deliver through our platform."

The partnership deepens BetaNXT's offering while expanding how CAIS provides access to alternatives across one of the wealth management industry's leading networks. Together, the two companies are expanding the boundaries of what advisory firms can build with alternatives, at scale, across the market.

"Advisors are moving alternatives from optional to essential, and the firms that can run them at scale will win," said **Brendan Cuddihy, Chief Operating Officer, CAIS**. "This partnership gives BetaNXT firms a more streamlined way to access CAIS' alternative investment marketplace, helping advisors connect with leading alternative asset managers and operate with greater efficiency."

### **About BetaNXT**

BetaNXT is a leading provider of frictionless wealth management enterprise solutions, powered by real-time data capabilities. We support key stakeholders across the financial services ecosystem — including broker-dealers, advisors, wealth managers, issuers, and asset managers.

Our integrated approach empowers clients with scalable trading and settlement services, robust asset servicing capabilities, regulatory-compliant investor communications, and advanced data management and analytics. BetaNXT's solutions streamline operations, enhance productivity, strengthen compliance and reduce enterprise cost, helping clients excel in the digital age. By investing in platforms, products and partnerships, we transform our

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clients' platforms into strategic differentiators that drive efficiency, performance and growth. For more information, visit [www.betanxt.com](http://www.betanxt.com).

### About CAIS

CAIS is the leading alternative investment platform for independent financial advisors. The CAIS platform powers the pre-trade, trade, and post-trade lifecycle of alternative investments and capital market strategies providing financial advisors and alternative asset managers with a single operating system for scale and efficiency.

CAIS serves over 2,000 wealth management firms that support more than 62,000 financial advisors who oversee approximately \$7.5 trillion in end-client assets. Founded in 2009, CAIS is headquartered in New York City with offices in Austin, TX; London; and Red Bank, NJ. CAIS continues to be recognized for its innovation and leadership including awards for Alternative Investment Firm of the Year by *Wealth Solutions Report*, WealthTech100 List by *Fintech Global*, Great Places to Work by *Fortune*, Best RIA Platform by SPI, Best Alternative Investments Solution by *Finovate*, and many others.

For more information about CAIS, please visit [www.caisgroup.com](http://www.caisgroup.com).

Securities offered through CAIS Capital LLC, member [FINRA](#), [SIPC](#).

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