



BetaNXT & Fi-Tek Introduce TrustWealthX, Allowing Clients to Seamlessly Manage & Report on Trust, Brokerage & Wealth Businesses

Two Leading FinTech Companies Partner to Upend Siloed Processing Among Trust & Non-Trust Business Lines—Offering a Streamlined View of Positions & Balances Across All Accounts

New York, NY— March 25, 2025—[BetaNXT](#), a leading provider of wealth management technology solutions with real-time data capabilities and an enhanced advisor experience, and [Fi-Tek, LLC](#), a leading FinTech company specializing in trust and wealth management technology, have come together to enable financial services organizations to streamline operations and workflows, enhance productivity, and reduce risk for their trust & wealth management, advisory, and brokerage divisions.

“With TrustWealthX, we are solving the major industry-wide problem of siloed processing for trust and non-trust business lines,” said **Bob Santella, CEO of BetaNXT**. “As partners, BetaNXT and Fi-Tek have made it possible for firms to seamlessly manage and report on their brokerage, wealth, and trust lines through a single lens. The integrated data, unified operations, and workflows offered by TrustWealthX will take the advisor and client experience to a whole new level.”

TrustWealthX delivers trust officers, advisors and their clients a **holistic “family view” of investment positions and balances across brokerage, advisory, and trust accounts**. Official books and records, regulatory reporting, and custody and clearing data for all of these accounts are available in real time.

In addition to the unified view of brokerage, advisory, and trust account investments, the integration enables users to harness account management and reporting capabilities across the BetaNXT and Fi-Tek ecosystems:

- **From BetaNXT:** Proprietary brokerage and accounting system, end-to-end operations from client to advisor, and client back-office operations.
- **From Fi-Tek:** Fi-Tek’s real time, global multi-currency trust and wealth management platform Global WealthES® (GWES) for front, middle and back-office, supported by back-office solutions including Specialty Assets, Performance Measurement, Data Aggregation, as well as full-service securities processing with multi- custodian options, including self-custody.

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“Working with BetaNXT aligns with our mission at Fi-Tek to solve the complex challenges faced by our clients across a wide spectrum of wealth segments—from brokerage all the way to family office—through technology innovation and evolution,” said **Subir Chatterjee, CEO and President of Fi-Tek**. “The integration of our leading solutions elevates the digital experience for financial services and wealth management organizations—and allows them to deliver more value for all of their clients, across their business lines.”

BetaNXT remains focused on solving its clients’ most pressing data modernization challenges. It [recently announced](#) that DataXChange, powered by Snowflake’s AI Data Cloud, has become fully operational in production, following a four-month pilot program which began in September 2024. DataXChange brings internal and external inputs—BetaNXT data, partner data, wealth enterprises’ proprietary data, and Snowflake Marketplace data—together in one data management ecosystem to deliver a flexible, customized, and connected experience that can optimize what data can do for wealth enterprises and their clients and partners.

About BetaNXT

BetaNXT powers the future of connected wealth management infrastructure solutions, leveraging real-time data capabilities to enhance the wealth advisor experience. Combining industry expertise with the power of our proven Beta, Maxit, and Mediant businesses, we are focused on solving our customers’ most demanding integration challenges with flexible, efficient, connected solutions that anticipate their changing needs. Our comprehensive approach reduces enterprise cost, streamlines operations processes, increases advisor productivity, and enhances the investor experience. Together with BetaNXT, wealth management firms are transforming their platforms into differentiating assets that enable enterprise scale and stimulate commercial growth. For more information visit www.betanxt.com.

About Fi-Tek, LLC

Fi-Tek is a leading FinTech company providing technology solutions to wealth management, family office and alternative investment market segments with its integrated GlobalWealthES (GWES) product, supporting a diverse client base consisting of global private banks, trust banks, broker/dealers, family offices, and RIAs. Fi-Tek has further enhanced its core GWES technology platform with cloud native purpose-based apps for advisors, executives and administration personnel for a 360-degree view of clients, as well as driving digital transformation across its client base. This would also enable better integration and data exchange with large financial institutions with presence in the Cloud. For more information, visit <https://www.fi-tek.com>.

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