



## **BetaNXT Announces Strategic Partnership with DeepSee to Advance AI-Driven Client and Advisor Retention**

*Collaboration brings predictive analytics and agentic AI together  
to help firms address attrition risk with greater precision*

**New York, NY — June 15, 2026 —** [BetaNXT](#), a leading provider of wealth management technology solutions with real-time data capabilities and advanced AI innovation, today announced a partnership with [DeepSee](#), the control plane for financial operations, to help wealth management firms proactively identify and address client and advisor attrition risk. As part of the collaboration, the companies have launched RetainX, an AI-driven retention intelligence solution that advances BetaNXT's AI roadmap through predictive analytics and actionable insights.

By combining BetaNXT's extensive wealth management data foundation and processing infrastructure with DeepSee's full-stack orchestration (FSO) of financial operations, the partnership is designed to help firms surface earlier signals, generate more actionable insights and respond more effectively to client and advisor needs.

"This partnership with DeepSee reflects our commitment to delivering innovation through collaboration," said **Sam Markey, Division Executive, Maxit at BetaNXT**. "By pairing our data and wealth management expertise with DeepSee's ability to turn complex operational data into action, we're creating new ways to help firms act earlier, serve clients and advisors more effectively, and support long-term growth."

"We've spent years tackling some of the hardest problems in middle- and back-office operations, and this partnership with BetaNXT extends that work into the front office," said **Steve Shillingford, Founder & CEO at DeepSee**. "Together, we're combining operational alpha and predictive intelligence to deliver full-stack orchestration for wealth management firms, helping them anticipate client and advisor needs and take earlier, more effective steps to strengthen retention."

The partnership reflects BetaNXT's strategy to embed AI and advanced analytics across its platform through targeted collaborations that deliver scalable, outcome-focused solutions for wealth management firms.

Initial deployments of RetainX are underway with select BetaNXT clients. For more information, please visit [RetainX | BetaNXT](#)

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

## **About DeepSee**

DeepSee is the control plane for financial operations, delivering full-stack orchestration. We help banks, capital markets, and wealth management firms convert fragmented, manual workflows into software-defined services—powered by AI agents that plan, orchestrate, and execute across applications and teams. Built for production operations, DeepSee delivers secure integration, robust governance, continuous evaluation, and human oversight—so you can scale from experimentation to enterprise-wide transformation. For more information, please visit [deepsee.ai](https://deepsee.ai).

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