



BetaNXT Launches Val, Infusing AI-Powered Document and Data Validation into Wealth Management

*First Release from the BetaNXT AI Innovation Lab
Reflects the Firm's Approach to Applied AI Innovation*

New York, NY – April 21, 2026 – [BetaNXT](#), a leading provider of wealth management technology solutions with real-time data capabilities and an enhanced advisor experience, announced today that it has rolled out Val, an intelligent validation platform designed to apply consistent, rules-based intelligence across documents, data, and workflows to ensure predictable outcomes at scale. The solution enables financial services firms to deploy automated validation logic across high-volume processes, improving accuracy, consistency and operational efficiency. Val is the first release from BetaNXT's new AI Innovation Lab, created to apply AI in focused, practical ways to solve high-impact operational challenges.

Initially focused on validating client communications prior to delivery, Val supports documents such as broker statements, trade confirmations, and tax forms by automating reviews that have traditionally relied on manual, reactive processes. By consistently applying client-defined rules across document populations, Val enables firms to identify issues earlier, reduce rework, accelerate processing and scale validation coverage.

"AI has the most value when it is purpose-built, responsibly deployed and aligned with real business outcomes," said **Bob Santella, CEO of BetaNXT**. "Our AI Innovation Lab was established to move beyond experimentation and deliver solutions that can be confidently adopted at enterprise scale. Val is a strong example of how we are applying AI to modernize critical workflows."

For financial services firms, this strategy delivers tangible impact by increasing confidence in the communications they deliver to clients at scale, while also establishing a foundation for broader operational validation across enterprises.

"We remain invested in fast-tracking the delivery of AI-driven solutions that can optimize operations for financial services firms and expand access to AI insights across their organizations, regardless of technical aptitude or role," said **Chris Nobles, Division Executive for Mediant, a BetaNXT business**. "Val simplifies the delivery of client communications while ensuring accuracy and consistency, without requiring additional resources."

BetaNXT Launches 'Val,' the Intelligent Validation Agent for Client Communications

The launch of Val follows BetaNXT's [recent introduction of InsightX](#), a powerful AI platform delivering automation, analytics and insights across enterprises, and which serves as the centralized data and intelligence engine powering the BetaNXT ecosystem.

Together, these solutions reflect BetaNXT's broader strategy to bring value to clients by applying AI across its ecosystem.

For more information about Val, or BetaNXT's ongoing AI strategy and focus, please contact your BetaNXT relationship manager or visit betanxt.com.

About BetaNXT

BetaNXT powers the future of Connected Wealth by investing in platforms, products and partnerships to accelerate growth. It is a leading provider of frictionless wealth management enterprise solutions, real-time data capabilities and an enhanced advisor experience. Through its software, data, and operations-as-a-service approach, BetaNXT empowers its clients with flexible, efficient and connected solutions that anticipate their changing needs. BetaNXT's comprehensive model reduces enterprise cost, streamlines operations processes, increases advisor productivity and strengthens the investor experience. Together with BetaNXT, wealth management firms are transforming their platforms into game-changing differentiators that enable enterprise scale and stimulate commercial growth. For more information visit www.betanxt.com.

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