



BetaNXT Named a Finalist in the *WealthManagement.com* 2025 Industry Awards for Technology Providers: Data Lakes/Warehouses

BetaNXT's DataXChange Accelerates Modernization, Innovation and Business Growth Through a Groundbreaking 'Connected Data' Ecosystem

New York, NY — June 25, 2025 — [BetaNXT](#), a leading provider of wealth management technology solutions with real-time data capabilities and an enhanced advisor experience, is proud to be a finalist in the *WealthManagement.com* 2025 Industry Awards (the “Wealthies”), in the Technology Providers: Data Lakes/Warehouses category.

BetaNXT was selected as a finalist based on the transformative capabilities and impact of its cloud-based [DataXChange](#) platform, which eliminates data chaos and accelerates data modernization with a single source of truth. DataXChange is the Connected Data engine that powers many new advisor-centric BetaNXT solutions and an end-to-end Connected Wealth experience — delivering more actionable intelligence, more meaningful personalization and greater efficiency overall.

The initial solutions built on DataXChange include CastX, which radically simplifies corporate actions workflows; TrustWealthX, which unifies the management and reporting for brokerage, wealth and trust businesses; and ReservePro, which streamlines the often manual and time-consuming 15c3-3 formula data collection, calculations and reporting process.

“Our data, technology and product teams dedicated themselves to the successful launch of DataXChange, and we have all been truly energized by the positive feedback from our clients and the industry at large. With DataXChange, we are helping investment and wealth firms at all stages of data maturity advance in their journeys more quickly and easily,” said **Bob Santella, CEO of BetaNXT**. “We are grateful for this latest recognition of our efforts from *WealthManagement.com*.”

DataXChange was also recently named a finalist for Best Managed Data Service Provider in the 2025 Waters Rankings as well as a finalist for Best Data Management Solution in the 2025 FTF News Technology Innovation Awards.

Now in its 11th year, the [WealthManagement.com Industry Awards](#) is the only awards program of its kind to honor outstanding achievements by companies, organizations and individuals that support financial advisor success. Winners will be announced at a gala and awards ceremony on September 4, 2025 at Cipriani 42nd Street in New York City. A panel of judges made up of top names in the industry, led by *WealthManagement.com* Director of Editorial Strategy and Operations, David Armstrong, chose the finalists and will determine the winners.

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“The Industry Awards are a beacon, illuminating the trailblazers and innovators who are shaping the future of the financial services industry,” said **Armstrong**. “They serve as a leading indicator of future activity, and as a barometer for the dynamic ecosystem of companies and organizations that empower, support and enable advisor success who are driving the industry forward.”

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.

About WealthManagement.com

WealthManagement.com, an Informa business, provides everything wealth professionals need to know to stay knowledgeable about the industry, build stronger relationships, improve their practice, and grow their business. WealthManagement.com offers financial services organizations a broad array of marketing services designed to help them influence the industry’s leading audience of wealth management professionals.

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