

BetaNXT Partners with Pave Finance to Bring AI-Powered Portfolio Management Capabilities to Wealth Management Firms and Financial Advisors

New York, NY — October 28, 2026 — [BetaNXT](#), a leading provider of wealth management technology solutions with real-time data capabilities and advanced AI innovation, today announced a strategic partnership with [Pave Finance](#), the leading AI-powered portfolio management platform for financial advisors and wealth managers, to bring advanced technology and automation capabilities to BetaNXT clients.

Pave's software platform uses AI to enable RIAs and wealth management firms to construct highly tailored automated portfolios around client goals, risk parameters, tax considerations, existing holdings, investment restrictions and preferences.

The partnership will give BetaNXT clients access to Pave Finance's portfolio management and workflow automation software. This will expand BetaNXT's offering to financial advisors and registered investment advisors (RIAs), while enhancing its wealth management suite with advanced portfolio construction, personalization, and optimization capabilities.

BetaNXT's scale and market presence, combined with Pave's sophisticated portfolio management and optimization capabilities, will enable firms to deliver more personalized investment experiences for clients at scale. By upgrading firms' technology, the partnership will enhance workflow efficiency through automation, from portfolio construction to execution, empowering managers and advisors to spend more time on what really matters: making high-value investment decisions, improving relationships with clients and expanding their businesses.

"Portfolio planning is increasingly important as advisors look to provide more customized investment solutions while operating efficiently and at scale," said **Tim Rutka, President of Trading and Settlement at BetaNXT**. "Our partnership with Pave expands the offerings available to our clients, giving them access to sophisticated technology that can help advisors seamlessly address investors' individual needs."

"BetaNXT's presence across the wealth management ecosystem creates a clear opportunity to bring Pave's software to more firms and advisors, strengthening their optimization, personalization, transition management and tax-aware portfolio management capabilities across their client rosters," said **Edward Tedeschi, Head of Strategic Partnerships at Pave**. "Together, we can help firms deliver highly personalized portfolios while giving advisors a platform that makes sophisticated portfolio management more scalable."

The partnership represents another step in BetaNXT's strategy to provide wealth management firms with an integrated ecosystem of technology and solutions spanning the investment and client lifecycle.

About Pave Finance, Inc.

Pave Finance, Inc. is a leading AI-powered portfolio management platform for financial advisors that enables investment advisors to customize, personalize, and automate portfolio construction and management. Pave Finance's business units include: (i) Pave Labs, LLC,

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provides Pave Pro, the portfolio management software platform; (ii) Pave Securities, LLC, which is a fully-disclosed introducing broker-dealer; and (iii) Pave Investment Advisors, LLC, which is an SEC-registered investment adviser. All subsidiaries are wholly owned by Pave Finance, Inc. Pave Finance's business model derives three primary streams of revenue: (i) software licensing revenue, which is priced using a SaaS licensing model with users paying a monthly license fee; (ii) broker-dealer revenues including, trading, securities lending, and spreads on credit and debit balances; and (iii) investment advisory fees for the automated management of assets on a discretionary and non-discretionary basis. Pave Finance was founded in 2021 and is based in New York, New York.

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.

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