

Beta

by BetaNXT

Delivering Market-leading Front-, Middle- and Back-office Technology

The Beta platform enables clients to take control of their securities processing and custody operations through scalable, secure, and modern technology. Beta clients leverage a suite of integrated and connected real-time workflow applications and APIs across the front, middle, and back offices.

Built to anticipate and help eliminate exceptions in the securities processing lifecycle, Beta connects its platform with workflow capabilities to increase efficiency, connectivity, and automation. Beta's advisor and investor portals, order management and trading tools, and third-party provider integrations are bolstered by real-time data, providing seamless connections between solutions.



Clearance and Settlement

Beta automates the trade, settlement, and asset servicing life cycle, helping ensure scale, security, compliance, and stability for clients. We provide over 500 APIs to manage the full gamut of operational functions, from account opening to regulatory reporting.



Accounting and Back Office Operations

Beta supports and enables portfolio valuation and management of accounts, fulfilling core books and records requirements. An advanced operational management tool, Operations Workbench, reduces friction in end-to-end securities processing and helps remove risk and exceptions from the trade and securities processing lifecycle.



Order Management and Trading Technology

An integrated order management and trading tool enables advisors and middle office practitioners to route, connect, and process orders via APIs or through the "BetaLink" user application. Trading tools and an integrated rules engine help compliance and alignment with investor risk profiles and objectives.



Advisor and Investor Portal

An integrated, household-based advisor and investor portal improves engagement and integrates supportive workflow functions to facilitate holistic wealth planning and management.



Account Opening

Streamlined and simple to use, the Beta platform ensures advisors can quickly and seamlessly open its "Wealth Web Service" APIs or a modern user interface.



Operations as a Service

Beta supports a professional service function, ensuring expertise and management where clients need operational support. The experience and knowledge of the Beta team helps clients remove risk and cost from internal operations resourcing.



Security Master

Beta provides a fully integrated security master as part of its core service. The service is pre-connected to a reference data platform, powering an 'out of the box,' data-enabled security master service providing valuation, pricing, and settlement.

BetaNXT

Transforming the Future of Connected Wealth

BetaNXT is a leading provider of frictionless wealth management infrastructure, real-time data solutions, and an enhanced advisor experience. We invest in platforms, products, and partnerships to accelerate growth for the ecosystem we serve. Our connective approach empowers our clients to deliver a comprehensive, end-to-end advisor and investor experience.

Combining industry expertise with the power of our proven Beta, Maxit, and Mediant businesses, we are focused on solving our clients' most demanding integration challenges with flexible, efficient, connected solutions that anticipate their changing needs.

Beta

Built to anticipate and eliminate challenges in the investment lifecycle, Beta delivers a solution set that ensures our clients and the advisors and investors they serve never miss a growth opportunity. We provide core information powering workflow applications, managed data for various integrated processes, and order management tools supporting essential trading activities.

Maxit

Maxit is the industry's only fully integrated, automated, and scalable end-to-end tax information reporting and cost basis accounting solution. Combining proven technology, robust processes, exceptional data accuracy, and decades of tax operation and experience, Maxit reduces the considerable operational burden of tax reporting and fulfills all regulatory requirements.

mediant

Mediant provides investor communications technology and technology-enabled solutions to banks, brokers, corporations, funds, and investment managers. Mediant expands upon BetaNXT's wealth management suite of solutions through its digital-forward communications capabilities, industry experience, and reliability.

Our Promise

Working with financial organizations to manage the world's wealth, our clients are the source of our inspiration as we navigate macro trends and market forces to:



Deliver critical business functions to manage workflow, reports, APIs, standard operating procedures, audit evidence, disaster recovery, business continuity, tax reporting, and more



Anticipate and eliminate challenges in the investment life cycle, to support our clients' evolving needs and growth goals



Connect the broader ecosystem, including utilities and exchanges, to offer an easy-to-integrate, adaptable, frictionless, and intuitive digital experience



Streamline administration and operations to deliver a cost effective platform without compromising quality



Transform wealth management technology and solutions to enhance the lives of people around the world