

Maxit

by BetaNXT

Delivering Your End-to-End Tax Solutions

Combining proven technology, robust processes, exceptional data accuracy, and decades of experience, Maxit by BetaNXT automates the operational burden of tax reporting and cost basis accounting, fulfilling regulatory requirements. This enables our clients to focus on their advisors and the investors they serve.

Maxit delivers a four-pronged approach: cost basis reporting, tax information reporting, tax optimization, and managed services. These components can be delivered as a holistic unit or individually as standalone offerings and can be supplemented with managed services to streamline processes.



Cost Basis Reporting

- Back-office agnostic, technology-friendly solution
- Highly automated, deep integration with back offices
- Provides trusted cost basis reporting compliance to over 100 registered firms



Tax Information Reporting

- Agnostic to back office and cost basis reporting solution
- Increases accuracy and reduces corrections to deliver a superior client experience
- Reduces the resources needed to support tax season operations



Tax Optimization

- Combines cost basis data and advanced portfolio analytics to deliver a better client experience
- Transparency into client portfolios to enhance the client/advisor relationship
- Value-added insights help gather assets and protect and grow AUM



Managed Services

- Reconciliation services for cost basis and tax reporting
- Tax information reporting operations
- Streamlined business operations support

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