

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.