

Powering the Future of Connected Wealth

BetaNXT is a leading provider of data-, operations-, and software-as-a-service solutions in support of critical advisor and investor workflows for our enterprise clients.

Through our businesses—Beta, Maxit, and Mediant—we provide a comprehensive, end-to-end advisor and investor experience. We offer connected, highly curated data structures, user-centric technology, and a robust partner network that provides seamless integrations for our enterprise clients.

Beta

Securities processing and custody operations

- Clearance and Settlement
- Accounting and Back Office Operations
- Order Management and Trading Technology
- Advisor and Investor Portal
- Account Opening
- Operations-as-a-Service
- Security Master

Maxit

End-to-end tax reporting solution

- Cost Basis Reporting
- Tax Information Reporting
- Managed Services
- Tax Optimization

Mediant

Investor communications and shareholder engagement

- Pre-sale and Post-sale Communications
- Proxy Distribution (Digital and Print) and Tabulation
- Ongoing Regulatory Reports
- Corporate Actions, Class Action, and Bankruptcy Notifications
- Statements and Confirms, ADVs, and Other Communications
- SRD II Proxy Voting and Disclosure Service

Advantages of working with us:

- ✓ Flexible solutions that provide end-to-end visibility and mitigate operational risk
- ✓ Integrated data and workflows across the BetaNXT platform
- ✓ API enabled with 500+ industry utility and third-party integrations
- ✓ Digital-first capabilities for the entire investor experience
- ✓ Dedicated customer service and support