



BetaNXT Introduces Revolutionary MIC Platform for Centralizing and Optimizing Investor and Advisor Communications

Enhanced Digital-First Secure Ecosystem Utilizes Streamlined, Interconnected Data to Resolve Challenges for Brokers that Historically Relied on Siloed Tech Stacks and Functions

New York, NY—April 4, 2024—BetaNXT, a provider of wealth management infrastructure solutions with real-time data capabilities and an enhanced advisor experience, announced today that its Mediant business has launched the evolved version of its cutting-edge MIC platform. The enhanced solution will streamline workflows for brokers, advisors, and investors while transforming investor and client communications.

The MIC ecosystem is an integrated solution that embodies a holistic approach to connecting data seamlessly throughout the investor and client communications lifecycle. This integration optimizes shareholder interactions and boosts engagement while fostering unparalleled efficiency, consistency, and reporting.

“In today’s digital-first era, the way brokers, advisors, and investors interact and communicate has undergone a significant transformation,” said **Sherry Moreland, President of Mediant, a BetaNXT business**. “The MIC platform represents a breakthrough in how data is utilized throughout the investor and client communications lifecycle, providing unparalleled efficiency, transparency, and security.”

Connected data within the MIC platform simplifies the manual nature of tasks such as resolving corporate action complexity, accessing summaries and detailed views of assets, retrieving corporate action positions and statements, and supporting proxy voting obligations. These functions can make it difficult for firms that have historically relied on siloed technology systems to serve investors who possess today’s digital-first mentality. The MIC platform makes it easy for these types of companies to intuitively meet the needs of their customers within a hyper-personalized, digital experience.

With a focus on connected data and hyper-personalization, the MIC platform addresses the evolving needs of the financial services industry. Each module within the MIC ecosystem provides a customized view of interconnected data that is tailored to the unique needs of each user—from operations staff to advisors and investors.

Crucially, the APIs on the MIC platform eliminate the need to exchange personally identifiable information (PII)—significantly strengthening data protection.

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Key features and benefits of the MIC platform include:

- **MIC Operations:** Centralized management of investor communications programs, providing an intuitive online dashboard for end-to-end visibility and proactive risk management. Powerful search and filter tools track distribution and receipt of proxy materials, prospectuses, and tender offers.
- **MIC Wealth Manager:** A detailed dashboard for advisors and investment managers that streamlines workflow, enhances productivity with efficient online tools for proxy voting and shareholder communications, simplifies routine tasks, and ensures compliance deadlines are met through timely reminders.
- **MIC Shareholder:** Enhances the investor experience with a convenient online platform to access shareholder communications, vote on proxy ballots, track meetings and voting events, manage delivery preferences, and more.

“By simplifying end-to-end digital investor, advisor, and client communications, our MIC platform helps lay the groundwork for the future of connected wealth,” said **Stephen C. Daffron, Chairman and CEO of BetaNXT**. “We are committed to finding new ways to ensure our clients can meet the evolving needs of all stakeholders and stay one step ahead of the digital-first revolution.”

About BetaNXT

BetaNXT powers the future of connected wealth management infrastructure solutions, leveraging real-time data capabilities to enhance the wealth advisor experience. Combining industry expertise with the power of our proven Beta, Maxit, and Mediant businesses, we are focused on solving our customers’ most demanding integration challenges with flexible, efficient, connected solutions that anticipate their changing needs. Our comprehensive approach reduces enterprise cost, streamlines operations processes, increases advisor productivity, and enhances the investor experience. Together with BetaNXT, wealth management firms are transforming their platforms into differentiating assets that enable enterprise scale and stimulate commercial growth. For more information visit www.betanxt.com.

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