



FOR IMMEDIATE RELEASE

CUSO Financial Services Celebrates 20 Years Strong with Special Events All Year

SAN DIEGO – April 12, 2017 – Sister broker-dealers [CUSO Financial Services, LP](#) (CFS) and Sorrento Pacific Financial, LLC (SPF) are celebrating the [20th anniversary](#) for CFS in 2017, continuing to prove the stability and value of the broker-dealers. The companies are well underway with the year-long celebration that started in January. March included a luncheon and a special birthday party, as March 1997 was the month CFS received its SEC/NASD (now FINRA) approval and officially became a broker-dealer. More activities are planned throughout the year, including events with clients and employees.

Now recognized as a successful third-party marketer that develops [investment programs inside financial institutions](#), CFS was founded by two women, [Valorie Seyfert](#) and [Amy Beattie](#), at a time when there were few women working, even as financial advisors, in the financial services industry. With assets under administration (AUA) now at nearly \$30 billion, the founders still work in the business daily and oversee the service and support of hundreds of investment programs at financial institutions around the country. CFS/SPF have more than 450 advisors under registration and 138 home office employees working at the headquarters in San Diego and distributed throughout the U.S. Over the twenty years, CFS has returned more than \$44 million in profits to its limited partner credit unions.

CEO Valorie Seyfert says, “The credit for our success really belongs to our employees. They have embraced our core values – service, flexibility, innovation, efficiency, spirit, and integrity – and incorporated those into our day-to-day culture, helping us to thrive. Our industry has changed a great deal over the past 20 years and still is, as witnessed by the recent recession and upcoming regulatory changes. Thriving despite challenges is a critical skill. We are very proud of how our teams have thrived through all the changes in the past 20 years, and we know they will continue to transform the company throughout the next 20!”



CFS and SPF specialize in building investment programs inside financial institutions and have had a commitment to technology and service innovation from inception. Numerous employees working at CFS have been there for greater than 15 years. Perhaps even more impressive, the company still has:

- its first employee (now senior VP for business systems)
- its first computer (on display)
- its first advisor (now a senior program manager)
- the CEO of its first credit union client (still a client, albeit at another credit union)
- its first keynote speaker (now a senior manager who heads up the employee training programs), and
- its first million-dollar producer (now a member of senior management).

In recent years, CFS/SPF have gained an impressive list of awards and accolades. Their technology innovations have been honored four times by the Bank Insurance & Securities Association. CEO Valorie Seyfert was recognized as the 2008 Ernst & Young Entrepreneur of the Year for Business Services in San Diego, and several CFS advisors and program managers annually rank in the top 100 identified by *Bank Investment Consultant* magazine.

About CUSO Financial Services, LP and Sorrento Pacific Financial LLC

Full-service, sister broker dealers CUSO Financial Services, L.P. and Sorrento Pacific Financial LLC (Members [FINRA/SIPC](#)) provide customized investment and insurance solutions to financial institutions. With branch offices and licensed representatives nationwide, both broker dealers are [SEC Registered Investment Advisers](#), with expertise in key areas including retirement services, wealth management, and fee-based and insurance products for individuals and business customers. For more information, see www.cusonet.com or www.sorrentopacific.com or visit their LinkedIn pages: [CFS](#) and [SPF](#).

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