

# SPOTLIGHT ON WOMEN

by **Joyce A. Glazer**  
Contributing Writer



**VALORIE SEYFERT**, *President and CEO,*  
CUSO Financial Services and Sorrento Pacific Financial

**What is the business of CUSO Financial Services?** We do financial planning, investments, and insurance services for banks and credit unions. We are a broker-dealer company that places financial advisors exclusively inside regional banks and credit unions.

**How did you begin?** I went to law school and worked in a broker dealer. When I practiced law, I represented banks and became known as the lawyer with expertise on the investment side with financial institutions that have investment programs. Then we branched out to credit unions.

**Were there any challenges starting the business?** The first challenge was that we had no money. My co-partner and I financed the business by mortgaging our homes and using our own money.

**Did you start the business together?** Yes, Amy Beattie and I co-founded the business 19 years ago. I am the big picture visionary and strategic planner and Amy implements the programs. We are dependent on each other.

**What is the ratio of women to men in your business?** It is about 50-50.

**How were you able to grow the business?** When we started, our competitors were much larger than us. We came in under the radar because the men in the business thought we would never make it anyway. Credit unions became the primary source of the business. By the time they realized we had a large market share, it was too late.

**What is your work schedule?** Better than it used to be. Today I typically work 10-hour days. I do have to travel a lot, so that makes a difference.

**How did you handle work and raising children?** I believe kids



BECCA BATTISTA

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thrive with structure. I always made Wednesday to Friday my travel days and was home the rest of the week. We involve families in our conferences and other company functions, so they have always been a part of the business.

**Do you have training programs for your employees?** We support learning new skills, because employees who understand the entire business are more loyal and can serve our clients better. We still have our first employee and our first advisor. We have leadership development programs and employee coaching and training. DreamBuilder is a one-year, one-on-one program that helps employees balance their personal and professional lives and achieve their goals. We’re not just a workplace, we’re a support system, and we strive to have happy employees.

**What do you do to support the community?** I was a swimmer when I was young and I got a scholarship to USC. Otherwise, I would not have been able to go to college. I was slated to be on the 1980 Olympic team before Jimmy Carter pulled the U.S. out of that year’s games. I sit on the Women of Troy Board and the Board of Counselors, both at USC.

At a company level, every month we have a committee that focuses on a cause. All employees can get involved as volunteers and fundraisers. Each year we have a 5K run and donate the funds to a charity.

**How do you see the future of the business?** We need more advisors, especially women. We need to make the business more desirable to young people who are looking at careers. We have developed tools that are mobile, online, and automated. By offering remote delivery services, we can attract more clients and more advisors.

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