



FOR IMMEDIATE RELEASE

Generations Federal Credit Union in San Antonio Steps Up Its Investment Program with Customized Integration from CUSO Financial Services

Generations cites the broker-dealer's ability to offer a hybrid program and its knowledge of the financial institution industry as rationales behind the move

SAN DIEGO – Jan. x, 2018 – CUSO Financial Services, L.P. (CFS) has added Generations Federal Credit Union of San Antonio to its roster of financial institution investment programs, a switch from the credit union's previous broker-dealer. CFS's in-depth knowledge and understanding of the credit union industry and its ability to offer a hybrid program, where the advisor is an employee of the credit union, were the reasons Generations executives gave for the move.

Generations has more than 52,000 members, \$541 million in assets and a strong base with city, fire department and police department employees. Generations executives interviewed four broker-dealers before choosing CFS to manage the investment program and its compliance operation. The credit union is already seeing positive results, with an increase of \$2.2 million in investment advisory dollars in just the last three months.

Marcel Theriot, senior vice president of finance for Generations, says, "In our previous investment program relationship, the financial advisors were employees of the broker-dealer and didn't really understand how our credit union makes a difference daily in the lives of our members. CFS management understood the banking channel and allowed us to brand the program in our own way, with our own advisor employee. They looked at the program holistically, as an integral part of our offerings, and we liked their anticipated technology enhancements."

In addition to industry-leading planning and reporting tools, Generations is also offering its members several CFS-developed, award-winning tech tools as well, including:

- BuildMyProfile™ – online profile form with customizable templates
- SendMyDocs™ – mobile app that allows clients to snap photos of documents and securely send them to financial advisors
- Financial Management Center – online investment assessment and referral tool

- MPV mobile – mobile app that allows clients to manage investment accounts securely
- eVISION™ – online trading platform
- fundVISION™ – mutual fund direct trading platform
- Home Banking Integration – a single-sign on access that consolidates the view of checking, savings, loan, and investment information all on one page in Generations’ normal home banking system.

In addition, Generations plans to be an early adopter of the digital advisor program that CFS will roll-out in 2018. CFS provides a comprehensive selection of products and services including investment, insurance, and advisory options. CFS does not offer proprietary products, reducing bias.

“Our 20-year history of placing investment programs inside financial institutions has taught us that you must be flexible to meet the needs of each FI’s community and client base,” said [Valorie Seyfert](#), president at CFS. “Generations recognized we would work with them to come up with the best possible program for their members. Maintaining their culture helps them grow their investment program and expand in their community. We are honored to be working with Generations and feel confident it will prove to be a long-term relationship.”

About CUSO Financial Services, L.P.

[CUSO Financial Services, L.P.](#) and its sister company, [Sorrento Pacific Financial, LLC](#) (Members [FINRA/SIPC](#)), are subsidiaries of [Atria Wealth Solutions](#). Established in 1997, they specialize in placing investment programs inside banks and credit unions, providing customized investment and insurance solutions to over 200 financial institutions throughout the country, with \$30+ billion in AUA. Headquartered in San Diego, with branch offices nationwide, both broker-dealers are [SEC Registered Investment Advisers](#), with expertise in key areas including retirement services, wealth management, advisory solutions and insurance products for individuals and business customers. For more information, see www.cusonet.com or visit LinkedIn pages: [CFS](#) and [SPF](#).

About Generations Federal Credit Union

Founded in 1940, Generations has a rich history of serving the City of San Antonio Fire and Police Department employees and their families. Generations FCU is now one of the largest credit unions in the greater San Antonio area with more than 51,000 members and \$540 million in assets. The Generations’ team is made up of longtime San Antonio bankers with a full array of products typically offered at big

banks, with an eye toward providing the experience and high-touch service offered at a credit union, making it easy to do business with.

Anyone who lives, works, volunteers, and worships or attends school in San Antonio or its surrounding counties, can join Generations FCU. Additionally, companies of all sizes can join Generations for their business banking needs; and can offer Generations membership as a benefit to their staff.

www.mygenfcu.org

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