



FOR IMMEDIATE RELEASE

CUSO Financial Services and Sorrento Pacific Financial Receive Fifth Consecutive Tech Innovation Award at Bank Insurance & Securities Association Annual Conference



SAN DIEGO – March 21, 2018 – Broker-dealer sister companies [CUSO Financial Services, LP](#) (CFS) and [Sorrento Pacific Financial, LLC](#) (SPF), subsidiaries of [Atria Wealth Solutions](#), were again honored for technology innovation by The Bank Insurance & Securities Association (BISA) at its annual conference. The broker-dealers were recognized with the award for the fifth year in a row, this time for fundVISION™, an innovative, consolidated platform for mutual funds which combines the ease and transparency of a brokerage account with the cost structure of direct business.

Built to improve processing of mutual funds for both financial advisors and their clients, fundVISION can hold multiple fund families in a single account. It provides the convenience of consolidated statements and tax documents while also giving advisors and their clients the advantage of diversification. The perfect account for a small to mid-sized investor who has only or mostly mutual funds for their investments, it allows the client to have a single point of contact servicing all their mutual funds. Multiple fees are eliminated or reduced, and money is invested faster than it would be with multiple direct business accounts. CFS/SPF are the first broker-dealers to introduce this type of mutual fund platform to the market.

Announced at BISA's 2018 Annual Conference, held March 6 - 9 in Hollywood, Florida, [The BISA Technology Innovation Award](#) recognizes leadership in the advancement of the financial services industry's products, services, and platforms through technology innovation. CFS and SPF were honored last year for their MyPortfolioView™ (MPV) mobile application that provides clients an easy and secure way to manage their investment portfolios remotely, twice before that for other mobile applications, and once

for a secure online profiling tool. All of these, including fundVISION, integrate seamlessly with dataVISION®, CFS/SPF’s client and account management system. CFS/SPF launched fundVISION™ in September, 2017 a result of collaboration with and customization of FundKeeper, a platform by U.S. Bancorp Fund Services and Envision Financial Services, Inc.

“At CFS and SPF, we are committed to offering financial institutions and advisors the best technology, capabilities, and services to support modern wealth management and enhance advisors’ and clients’ experiences,” said Valorie Seyfert, president of CFS/SPF. “Success in this industry comes down to making life easier and more efficient for advisors and their clients, and fundVISION™ is another CFS/SPF service that does just that. We are honored to be recognized for our commitment to advancing technology-based solutions for the industry.”

About CUSO Financial Services, LP and Sorrento Pacific Financial LLC

[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 credit unions and banks, 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 Atria Wealth Solutions

Atria Wealth Solutions (Atria) is a modern wealth management solutions holding company founded in 2017 and designed specifically for today’s advisors and their clients. Headquartered in New York City, Atria’s core mission is to empower its subsidiaries’ financial advisors with a next-generation set of tools, services and capabilities that support their growth and enable them to prosper in a digitally connected and constantly evolving financial environment. For more information, please visit www.atriawealth.com.

###

Contact:

Beth Walsh

beth@clearpointagency.com

760-230-2424