FOR IMMEDIATE RELEASE

CUSO Financial Services and Sorrento Pacific Financial Executive Daniel Kilroy Named CFO of The Year by San Diego Business Journal

SAN DIEGO – March 27, 2018 – Sister companies, CUSO Financial Services, L.P. (CFS) and Sorrento Pacific Financial, LLC (SPF), subsidiaries of Atria Wealth Solutions, announce today that Executive Vice President and Chief Financial Officer Daniel Kilroy has been named CFO of the Year in the category for Large Privately Held Companies, by the San Diego Business Journal.

Each year, the San Diego Business Journal honors the financial wizards who work behind the scenes — the chief financial officers. Now in its 13th year, the CFO of the Year Awards recognize contributions to company growth, leadership, and community involvement by top financial executives in the area. A panel of independent judges, drawn from the region's top financial leaders, narrowed over 100 submissions to the top 70 across categories for public and privately-held companies, nonprofits, government agencies, and education. In addition to the application process, CFOs also underwent an in-person interview.

Before coming to CFS/SPF, Kilroy headed up finance at several major institutions. His background and extensive financial services experience with broker-dealers and investment management firms prepared him well for his current role as EVP/chief financial officer at CFS/SPF. He is a driving force helping to ensure the success of the company, which now works with over 220 financial institution customers, has more than $30 billion in assets under administration, and oversees a growing team of approximately 500 financial advisors.

"In 2008, we hired Dan to set the stage for continued growth," said Valorie Seyfert, president. "He inspires management and employees alike to continually develop new and better tools, technology, services, and support that help our clients to prosper. With his deep knowledge of corporate finance, financial analysis, and planning he provides invaluable strategic insight to our companies and our clients to navigate the complexities of the financial services industry. We are grateful for his many talents, integrity, and leadership and are so proud to congratulate him on this very deserving recognition."

Dan's efforts at CFS/SPF have been instrumental in:

- Guiding the companies through a complex transaction late last year, furthering their collective vision to build the industry's best wealth management firm serving advisors, financial institutions, and their clients.

- Advancing the companies' focus on providing award-winning wealth management tools to credit unions, banks, and their customers, including helping develop the first no-transaction-fee platform for mutual funds, fundVISION™, launched this past year.

- Keeping management and employees focused on assessing new products and service areas, business strategies, and key metrics that matter to advance financial institutions' growth and wealth management needs.

- Ensuring a banner year for CFS/SPF financially.

- Fostering advancement and teamwork across his department and a positive workplace environment overall.

"Even though his job is demanding, Dan always makes time for the team and always makes decisions based on how to best serve our clients. He is a great listener, a strategic, big picture thinker, a problem solver, and an overall joy to work with," says Yubie Asghedom, VP, accounting/controller, who has worked with Dan for over seven years.

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 their LinkedIn pages: CFS and SPF.

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