



FOR IMMEDIATE RELEASE

CUSO Financial Services and Sorrento Pacific Financial Show Financial Services Expertise in Spring 2018 Industry Conferences

Sister broker-dealers to exhibit and demonstrate leading technologies at industry conferences

SAN DIEGO – March. 8, 2018 – [CUSO Financial Services, L.P.](#) (CFS) and [Sorrento Pacific Financial, LLC](#) (SPF), subsidiaries of [Atria Wealth Solutions](#), will be exhibiting and presenting at two financial services conferences this spring. The conferences include the Bank Insurance & Securities Association's (BISA) 2018 Annual Convention on March 6 – 9 and the 2018 National Association of Credit Union Service Originations (NACUSO) Network Conference on April 16 – 19.

[BISA's 2018 Annual Convention](#) brings together banking and securities professionals from around the country to discuss the latest trends and topics in finance. On Thursday, March 8 at 10:15 a.m., Chief Growth Officer for Atria Wealth Solutions Kevin Beard will be a speaker at a panel discussion on the topic of independent practice acquisition. Executive Vice President, Program Development for CFS/SPF [Kevin Mummau](#) will be a speaker at a peer group discussion on the topic of credit union investment programs on Friday, March 9 at 9:00 a.m. During the conference CFS/SPF will exhibit at booth #317 and will provide live demonstrations of its home banking integration, which integrates investment programs with banks' existing core products to give clients a holistic view of all their investments, and its mobile application, [MyPortfolioView™](#) (MPV), which provides a secure way for clients to work remotely with their financial advisors on portfolio management. Additionally, CFS/SPF are nominated for BISA's Technology Innovation Award for their dataVISION® client and account management system. The three-day event is being held at the Diplomat Beach Resort in Hollywood, Florida.

[The NACUSO Network Conference](#) is the only conference dedicated to credit unions and the CUSO (credit union service organization) industry. Attendees will have the opportunity to participate in compelling and informative breakout sessions presented by some of the credit union industry's most accomplished leaders. As platinum sponsors for the conference, CFS will be exhibiting at the network lounge throughout the three-day event, to be held in Anaheim, California at the Disneyland Hotel.

Attendees interested in meeting with the CFS/SPF team at these events may contact Senior Vice President of Business Development Connie Gregory, at cgregory@cusonet.com or 858-530-4440 to set up a specific appointment time.

About CUSO Financial Services, LP and Sorrento Pacific Financial LLC

Established in 1997, 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 over 200 financial institutions throughout the country, with over \$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 both individuals and business customers. For more information, see www.cusonet.com or visit their LinkedIn pages: [CFS](#) and [SPF](#).

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