



FOR IMMEDIATE RELEASE

## **CUSO Financial Services and Sorrento Pacific Financial, Working with Parent Company Atria Wealth Solutions, Plan Multimillion Dollar Upgrades to Technology Platform**

**SAN DIEGO** – April 18, 2018 – Sister companies, [CUSO Financial Services, L.P.](#) (CFS) and [Sorrento Pacific Financial, LLC](#) (SPF), are working with their parent company, [Atria Wealth Solutions](#), to make significant enhancements to their award-winning dataVISION® financial advisor platform. Atria has pledged a multimillion dollar investment to progress dataVISION to the next level through improvements to its functionality and positioning dataVISION for even more rapid enhancements and new capabilities in the near future.

With the planned enhancements, the system will stay ahead of the trends impacting financial investment programs by providing upgrades to functionality and integration with leading solutions - all built within a modern, unified experience. Enhancements will include new advisory solutions, digital advice, collaborative tools, redesigned online and mobile client experiences, reporting, workflow and lead management tools, all seamlessly integrated into dataVISION.

Enhancements are planned to be released in the second half of 2018 and will be introduced quarterly over the following 18 months, delivering meaningful, easy-to-adopt tools that enable financial advisors to benefit from new functionality immediately.

“This is an incredibly exciting time for both our firms and our clients and we know it’s critical to engage our user base to get their feedback during the development process to optimize the new functionality,” said Valorie Seyfert, president of CFS/SPF. “We are doing these upgrades to make it simple for both financial advisors and their clients to easily and efficiently use the platform to manage their financial situation and collaborate more effectively with one another. We believe this will keep dataVISION® as one of the leading platforms in the financial services marketplace.”

These investments continue CFS/SPF/Atria’s commitment to technology which started with two progressive women business leaders, Valorie Seyfert and Amy Beattie, who founded CFS/SPF in 1997 with the idea of investing in better technology and services for credit union and bank investment programs.

“We really have a unique opportunity to build something differentiated and industry-leading with the CFS/SPF platform”, said Eugene Elias, COO of Atria Wealth Solutions. “We are investing significant capital and resources to enhance the existing capabilities while at the same time making new investments in future capabilities and leading technologies. Wealth digitization is in the early stages, but it is essential to commit now, otherwise programs will be unable to compete, leaving their financial advisors and clients behind.”

### **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](http://www.cusonet.com) or visit their LinkedIn pages: [CFS](#) and [SPF](#).

### **About Atria Wealth Solutions**

Atria Wealth Solutions (Atria) is a modern wealth management solutions holding company 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. Atria’s subsidiaries include CUSO Financial Services, L.P. and Sorrento Pacific Financial, L.P. For more information, please visit [www.atriawealth.com](http://www.atriawealth.com).

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