



Envision Financial Systems Congratulates CFS and SPF on Technology Award

Firms recognized for fundVISION™, a consolidated platform for mutual funds powered by FundKeeper technology

COSTA MESA, CA, April 12, 2018 /24-7PressRelease/ -- Envision Financial Systems, Inc., a leading provider of real-time mutual fund shareholder recordkeeping technology congratulates CUSO Financial Services, LP (CFS) and Sorrento Pacific Financial, LLC (SPF) for winning a Tech Innovation Award at the Bank Insurance & Securities Association Annual Conference. The sister companies, subsidiaries of Atria Wealth Solutions, were recognized for fundVISION™, an innovative, consolidated platform for mutual funds powered by Envision's FundKeeper technology. The BISA Technology Innovation Award recognizes leadership in the advancement of the financial services industry's products, services, and platforms through technology innovation. The broker-dealers were recognized with the award for the fifth year in a row.

"Hats off to CFS and SPF on this honor and their impressive winning streak," said Envision CEO Satnam Gambhir. "With their innovative fundVISION™ deployment, these two important Envision customers are providing their advisors and clients with a powerful tool for consolidating multiple funds in a single account with the operational efficiencies of brokerage and the low cost of direct fund business."

The fundVISION™ platform leverages Envision's FundKeeper solution, which was launched last year in collaboration with U.S. Bancorp Fund Services. FundKeeper brings financial intermediaries a new approach to supporting mutual-fund-only investor accounts. Traditionally, intermediaries have held these accounts directly with mutual fund families—and suffered business inefficiencies and lack of control. Or, they've been forced to "go to traditional brokerage" with accounts unsuited to conventional brokerage fees and complexity. FundKeeper is a more effective alternative to both these options with better economics in most cases.

About Envision Financial Systems, Inc.

Founded in 1994, Envision Financial Systems, Inc. is a premier provider of real-time mutual fund recordkeeping technology and outsource solutions. Using in-depth knowledge of the industry and listening to its customers, Envision's solutions enable firms with subaccounting needs to consolidate and control investor activity, increase representative and investor satisfaction, and help mitigate operational and economic risks. Envision supports over 420 investment companies, comprised of over 11,700 CUSIPS representing over \$2.2 trillion in client assets. Envision's headquarters are in Costa Mesa, California, with offices in Owings Mills, Maryland, Denver, Colorado and Bangalore, India. For more information, visit www.enfs.com.

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