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Polish National Credit Union Works with CUSO Financial Services to Develop Investment Program for Members

Start-up program has already gained more than \$11 million in AUM in its first six months

SAN DIEGO – April 25, 2018 – [CUSO Financial Services, L.P.](#) (CFS), a subsidiary of [Atria Wealth Solutions](#), announces it is working with Polish National Credit Union of Chicopee, Mass. to develop a start-up [investment program](#) for its members. The dual employee program has been operating just over seven months and has already worked with members to put \$11.5 million under management. Polish National (PNCU) reviewed five broker-dealers before choosing CFS to support the program, citing its great reputation in the industry and its knowledge of the credit union model as the reasons for the choice.

The \$555 million, community-chartered credit union, with over 23,000 members, launched the program with TV commercials running across local and cable stations for two months. It is also running educational planning workshops on estate planning, retirement planning and life insurance.

Kevin Kober, director of retail banking for PNCU, says, “As this is our first investment program, it was important for us to work with a broker-dealer that understands our philosophy and knows how to integrate the investment program into the core offerings of our credit union. We have found CFS management very easy to work with.” He added, “We are working on building a strong foundation for the program in this first phase and will be adding more technologies in the near term.”

In a dual employee program, the credit union employs the advisors while they are licensed and supervised by CFS. Currently the program has one advisor/program manager, Chris Casale, and one sales assistant. They plan to hire more advisors as the program grows.

“We are honored to have been recommended to PNCU’s president, James Kelly by another one of our clients,” said [Valorie Seyfert](#), president for CFS. “We think this is a great testimonial to our programs and look forward to working with PNCU to make their investment program a success for both the credit union and its members.”

About CUSO Financial Services, L.P.

[CUSO Financial Services, L.P.](#) (Member [FINRA/SIPC](#)) and its sister company, [Sorrento Pacific Financial, LLC](#), are subsidiaries of [Atria Wealth Solutions](#). Established in 1997, they specialize in placing investment programs inside banks and credit unions, 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](#).

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