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CUSO Financial Services Supports Tulsa Federal Credit Union in Launching Investment Program for Members

Tulsa FCU cites the broker-dealer's knowledge of the financial institution industry and glowing reviews from other clients as reasons for choosing CFS

SAN DIEGO – April 5, 2018 – [CUSO Financial Services, L.P.](#) (CFS), a subsidiary of [Atria Wealth Solutions](#), has assisted [Tulsa Federal Credit Union](#) in launching a fully-managed investment program, operational since September 2017. Tulsa FCU executives' top reasons for choosing CFS were its in-depth knowledge and a similar internal culture.

The \$735 million, community-chartered credit union, with 56,000 members and 14 branches serving the Tulsa, Muskogee and Bartlesville CSA region, reviewed six broker-dealers before asking three to submit proposals. In doing their due diligence, the executives at Tulsa FCU checked multiple references of the broker-dealers.

Susan M. Williams, CFA, who is chief financial officer of Tulsa FCU, says, "It was very important for us to find the right partner, especially since this was the first investment program we have offered. Our vision is to serve and enrich the lives of others and we needed a partner who understood this credit union philosophy and how important trust, integrity and teamwork are in making a difference for our members. We spoke with several other credit unions that use CFS and they gave the company glowing reviews. Plus, CFS had the tools and services we needed and a commitment to personalized attention with a strong focus on integrating the program into the offerings of our credit union, so we knew this was the right fit."

In a fully-managed program, CFS employs both the advisors and the program manager. CFS hired one advisor, Chris Armstrong, to launch the program with program manager, Jeffrey Ferraris. They started by training the employees in the branches so they would better understand how the program supplements other services offered, and set up a [wealth management assessment program](#) on the Tulsa FCU website that would help members assess their own needs at various life stages. Tulsa FCU has launched targeted marketing campaigns to create awareness.

“We spend a great deal of time training our advisors on how to integrate investment services into the core offerings of a credit union and how to work with both credit union employees and members,” said [Valorie Seyfert](#), president at CFS. “It builds confidence in the program while also meeting the investment needs of the members. We appreciate the trust and partnership Tulsa FCU has shown us and we look forward to working with them to build a very successful investment program.”

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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