



CUSO Financial Services Continues Growth with Customized Investment Program Options for New Clients Across the U.S.

Seven additional new credit unions develop investment programs with CFS support

SAN DIEGO – Aug. 28, 2018 – [CUSO Financial Services, L.P.](#) (CFS) continues its trajectory as a leading broker-dealer for financial institutions with the addition of seven credit unions across the U.S. to its growing roster of investment programs. The credit unions, varying in size, location, and investment program operational models, have each partnered with CFS to introduce or expand investment and technology offerings for their members. The credit unions include [4Front Credit Union](#) in Michigan, [Capital Credit Union](#) in North Dakota, [Cascade Federal Credit Union](#) in Washington State, [Department of Commerce Federal Credit Union](#) in Washington D.C., [Kern Federal Credit Union](#) in California, [People First Federal Credit Union](#) in Pennsylvania, and [Oklahoma’s Credit Union](#) in Oklahoma.

People First Federal Credit Union (PFFCU), with \$557 million in assets, eight branches, and 70,000+ members, is one of the larger firms recently joining CFS. PFFCU is working with CFS to develop a new startup, managed investment program for its members, expanding on its mission to provide the highest quality financial services in a friendly, convenient, personalized atmosphere.

Jeffrey Albert, President/Chief Executive Officer, at the credit union summarized: “It was clear CFS could support our members with the personal service they deserve and allow us to build easy and convenient mobile technologies as the program develops. We considered two other firms, but were drawn to CFS because of its comprehensive and fully integrated dataVISION® platform as well as their ability to work jointly with us to develop new service outreach initiatives. So far, since starting our investment program with them in May, we have already gained tremendous interest from our members with nearly \$1 million in the pipeline.”

CFS offers a great deal of flexibility in the operational models that are offered to credit unions, including fully-managed programs, dual employee programs, and hybrid programs. In all cases, CFS protects program reputations with its strong compliance record and drives advisor successes with its benchmark-driven practice management and training departments. CFS’s tradition of “white glove” customer service plus efficient, multi-channel delivery systems and upgraded technologies, such as fully-integrated home

banking for investments, have made it a favorite investment program partner for credit unions. In addition to PFFCU, the other new clients and program types are:

- 4Front Credit Union – \$512 million in assets, 14 branches, and 70,000 members across Michigan, for a startup managed program.
- Capital Credit Union – \$459 million in assets, 10 branches, and 30,000 members across Bismarck, Hazen, Fargo, Beulah, and New Salem, ND for a managed hybrid program.
- Cascade Federal Credit Union – with \$300 million in assets, four branches in Kent, Seattle, Everett, and Vancouver, WA, and over 10,000 members, for a startup managed program.
- Department of Commerce Federal Credit Union – with \$435 million in assets, three branches, and over 19,000 members in Washington D.C., for a startup managed program.
- Kern Federal Credit Union – with \$245 million in assets, two branches in downtown and northwest Bakersfield, CA, and over 20,000 members, for a dual program.
- Oklahoma’s Credit Union – with over \$503 million in assets and over 40,000 members in Tulsa, Oklahoma City, Edmond, and Vinita, for a startup managed program.

CFS and its holding company Atria Wealth Solutions recently announced large capital investments into its award-winning dataVISION® financial advisor platform and leading client portal, MyPortfolioView™, continuing their evolution as the premier platform in the industry. Audiences at the firms’ recent [Annual Conference](#) were thrilled with hands-on interactions with these new capabilities as well as a behind the scenes look into new technologies slated for early next year.

“We are pleased to welcome all of our new programs to CFS. With more than 20 years of placing investment programs in hundreds of financial institutions across the country, we know the needs of every credit union are unique, and we welcome each and every one,” said [Valorie Seyfert](#), CEO at CFS. “We deliver on our promises of flexibility, service, and award-winning technology for each of our financial institutions to develop a program that successfully serves their needs and the needs of their members. We’re honored so many credit unions continue to choose us as their broker-dealer.”

About CUSO Financial Services, L.P.

CUSO Financial Services, L.P. and 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 or visit their LinkedIn pages: [CFS](#) and [SPF](#).

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