



FOR IMMEDIATE RELEASE

Karen Goldstein Joins CFS and SPF as VP of Practice Management and Training, Enhancing Financial Advisor Experience at Leading Broker-Dealer

Goldstein to oversee department assisting investment advisors, assistants, and program managers in growing practices to meet business goals at CUSO Financial Services and Sorrento Pacific Financial



SAN DIEGO – September 25, 2018 – Broker dealers [CUSO Financial Services, L.P.](#) (CFS) and [Sorrento Pacific Financial, LLC](#) (SPF) have added [Karen Goldstein](#) as vice president of practice management and training. At CFS/SPF, Goldstein oversees practice management consulting, offering wealth management best practices and comprehensive growth strategies to assist advisors, sales assistants, and program managers in differentiating their practices, developing business plans, achieving goals, and creating success in daily practice activities.

Goldstein leads teams in developing and delivering training content to field and back office employees. She also leverages a variety of educational methods—including on-demand videos, instructor-led live webinars, and regional educational events—to ensure foundational knowledge and coaching options for nearly a thousand users. She draws on 20 years of experience in the financial services industry and a strong background in working at large independent broker-dealers, managing advisor training, back-office employee training and business consulting.

“Our mission in practice management and training, is to gain adoption of our technology and resources in order to improve the performance of our advisors, and help achieve higher levels of business success,” said Goldstein. “All of the projects we’re tackling this year have those ultimate goals in mind, and I’m so excited to be on this journey with CFS/SPF.”

Prior to CFS/SPF, Goldstein served as vice president of training and then vice president of the Business Consulting Group at First Allied Securities. She was previously with LPL Financial as a training manager. She has a bachelor of science degree in business management from San Diego State University. She also holds a Certified Wealth Strategist designation from Cannon Financial Institute, Accredited Investment Fiduciary (AIF®) designation, and Series 7 and life and health insurance licenses.

Goldstein will help advance CFS/SPF's reputation for providing cutting-edge technology and customer service to address the needs of banks and credit unions. In addition to having won numerous technology awards, the companies average less than a 20-second wait time on telephone customer service, and staff members that support advisors have an average of nine-plus years' experience each.

“At CFS/SPF, we believe in giving advisors all the tools they need in this constantly evolving industry—from access to world-class technology to the highest levels of personal attention from a real person, when and how they need them,” said [Valorie Seyfert](#), president and CEO of CFS/SPF. “Under Karen’s direction, our practice management and training teams will support advisors with best practices, benchmarks, and actionable tools to help them improve their relationships with clients and address their needs. Karen has already been instrumental in developing and recently implementing our second-generation learning management system. We welcome her aboard!”

About CUSO Financial Services, LP and Sorrento Pacific Financial LLC

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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