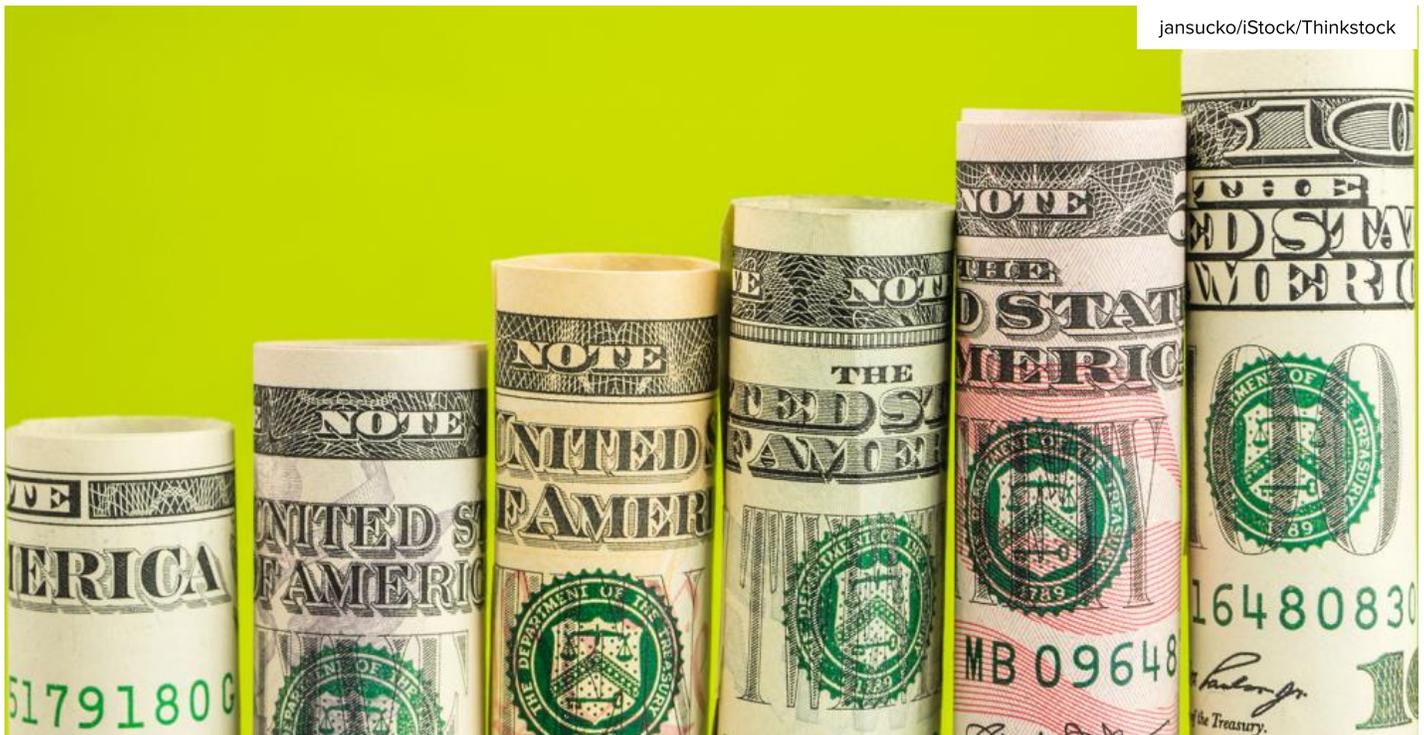


THE DAILY BRIEF



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Credit Union-Focused B/D Announces Record 2018 Revenue

CUSO Financial Services, a b/d subsidiary of Atria Wealth Solutions, renewed contracts with more than a dozen credit unions with \$36 billion in client assets.

Diana Britton | Mar 05, 2019

San Diego-based CUSO Financial Services, a broker/dealer focused on credit unions, said it had a record 2018 in terms of revenue, renewing contracts with more than a dozen credit unions with \$36 billion in client assets and 2.4 million members.

Most recently, the firm renewed a multiyear contract with Allegacy Federal Credit Union of North Carolina, which has \$1.47 billion in assets and more than 148,000 members.

CUSO is a subsidiary of Atria Wealth Solutions, the private equity-backed wealth management holding company launched by former Morgan Stanley executive Doug Ketterer in 2017. Atria also owns sister b/d Sorrento Pacific Financial, also in San Diego.

Last April, Atria acquired Cadaret, Grant & Co ., a Syracuse, N.Y.-based independent b/d with about 900 advisors and more than \$23 billion in assets under administration. Most recently in January, the firm acquired NEXT Financial Group , a Houston-based independent b/d with about 500 advisors and \$13 billion in AUA.

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