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Description automatically generated**CUSO Financial and Florida Credit Union Announce Multi-Year Relationship**

**San Diego, CA / Gainesville, FL** – **April 1, 2021** – [CUSO Financial Services, L.P.](https://cusonet.com/) (“CFS”) today announced a multi-year agreement with [Florida Credit Union](https://flcu.org/) (“FCU”) to oversee and develop its investment services program. Established in 1954, FCU provides financial services to North and Central Florida with approximately $1.4 billion in assets and nearly 120,000 members. The partnership is attributed to CFS’s commitment to delivering a customizable investment program with an expanding suite of products and services to meet FCU’s growth goals and its community and members' evolving expectations.

FCU is deeply committed to its Florida community and is always looking for new and optimal ways to serve its members. In recent years, the credit union has upgraded its member experience with more technological and digital innovation. With this and a growing member sentiment for greater technology solutions in mind, FCU sought out the most beneficial managed program relationship. In 2020, after a robust request-for-proposal process, FCU determined that CFS would be the ideal partner for its members and their expanding financial needs.

“FCU was looking for a trusted partner, one who understands the importance of facilitating stronger relationships with members, stays ahead of industry trends, maintains a continuous investment in technology, and provides unparalleled service,” said **David Eckhardt, Chief Operating Officer at Florida Credit Union**. “It has become increasingly important for our members to see their investments and finances in one place and have the ability to easily contact their financial professional in numerous ways, including secure and compliant business texting. CFS makes this easy with its integrated portals for both financial professionals and members. Additionally, CFS provides a series of educational opportunities dedicated to our members—which further strengthens our commitment to the ongoing enhancement of financial literacy within our community.”

CFS and its parent firm, [Atria Wealth Solutions](https://www.atriawealth.com), maintain an unwavering commitment to technology as a means to solidify and enrich relationships. Using its integrated advisor platform, Unio, and intuitive client portal, Clear1, CFS can develop, customize, and support investment programs—enabling credit unions to provide an exceptional experience to their members.

“CFS believes in deepening the relationships between the credit union and its members, which sets us apart from other managed programs in the industry,” said **Valorie Seyfert, President at CUSO Financial Services**. “We are committed to delivering the best tools, technology, investment solutions, and quality service to make it easier for credit unions to have more meaningful interactions with their members and develop lasting relationships. We are excited to begin this partnership with FCU and look forward to expanding and customizing its investment program to meet the unique needs of FCU’s members.”

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**About CUSO Financial Services, L.P.**  
CUSO Financial Services, L.P. (CFS) and Sorrento Pacific Financial, LLC (SPF) are full-service broker-dealers and subsidiaries of Atria Wealth Solutions. Each broker-dealer is registered with the Securities and Exchange Commission (SEC) as both a broker-dealer and as an investment adviser, and are members of the Financial Industry Regulatory Authority (FINRA) and the Securities Investor Protection Corporation (SIPC).  Established in 1997, CFS and SPF specialize in placing and supporting investment programs within financial institutions. From their headquarters in San Diego, the companies provide customized investment and insurance solutions to over 200 banks and credit unions across the country with more than $37 billion in assets under administration with expertise in key areas, including retirement services, wealth management, advisory solutions and insurance products for individuals and business customers.

For more information, visit [cusonet.com](https://cusonet.com/), or LinkedIn at [CUSO](https://www.linkedin.com/company/cuso-financial-services-lp/?viewAsMember=true) and [SPF](https://www.linkedin.com/company/sorrento-pacific-financial-llc/?viewAsMember=true).

**About Florida Credit Union**  
Florida Credit Union is a full-service financial institution. Founded in 1954 as the Alachua County Teacher’s Credit Union, FCU now services over nearly 120,000 consumer and business members in 45 counties throughout North and Central Florida with a wide range of products and services.

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