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Description automatically generated**CUSO Financial and Quincy Credit Union Announce New Partnership**

**San Diego, CA / Quincy, MA** – **June 24, 2021** – [CUSO Financial Services, L.P.](https://cusonet.com/) (“CFS”) today announced a multi-year agreement with [Quincy Credit Union](https://www.qcu.org/) (“QCU”) to implement and grow its investment services program through Quincy Investment Services, an affiliate of Quincy Credit Union. The relationship with CFS comes at a pivotal time for QCU as it seeks to expand its suite of products and services to include investment services and meet the growing needs of the community. Currently, QCU serves over 35,000 members with approximately $700 million in assets. This partnership will enable QCU to serve more members of its community, provide options for holistic retirement and financial planning solutions, and build an enhanced digital presence.

“Quincy Credit Union is proud to partner with the industry-leading team at CFS to launch Quincy Investment Services,” said **John Miller, CEO at Quincy Credit Union**. “We’ve listened to our members, who have been asking for investment services, and are excited to offer them both through our branches and digital channels. I’ve partnered with CFS at previous financial institutions and am confident that together, we will deliver top-notch and personalized services that our members deserve. CFS has excellent financial advisors and leading digital platforms that will serve current and future members through the channels of their choice.”

Since 1997, CFS has provided investment programs with award-winning technology, comprehensive support services, and a customizable collection of investment solutions. These solutions are exclusively delivered by teams of experienced personnel and are designed to serve the expanding financial needs of credit unions. Today, CFS and its parent firm, [Atria Wealth Solutions](https://www.atriawealth.com/), Inc., maintain a steadfast commitment to technology and digital innovation, designed to enhance, not replace, the human connection and deepen relationships. CFS enables credit unions to provide an exceptional experience to their members, using its acclaimed integrated advisor platform, [Unio](https://www.atriawealth.com/institutions/), its celebrated intuitive client portal, [Clear1](https://cusonet.com/clear-1/), and its investment services expertise.

“We are really excited that QCU chose to partner with CFS,” said **Valorie Seyfert, President of CFS.**  “We’ve had a longstanding relationship with John Miller, and he knows firsthand how a strategic partnership with CFS can elevate QCU’s relationship with its members. Driven by our vision and commitment to help firms bring out their best, we look forward to helping QCU deepen its relationships with its members. By understanding QCU’s unique needs, CFS will be able to provide expert advice and customized investment solutions for the communities it serves.”

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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 advisor 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 $38 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 Quincy Credit Union**  
Quincy Credit Union has been providing financial services to its members since 1937. They currently serve over 35,000 members with $700 million in assets, and operate from two locations: 100 Quincy Avenue, Quincy, MA and 519 Columbian Street, Weymouth, MA. Membership is available to family of existing members, and those who live, or work in Norfolk, Plymouth Counties and the communities of Dorchester and their family.

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