

**CUSO Financial Announces New Partnership with Cornerstone Investment & Retirement Services**

*Second credit union to join CFS in first month of 2022 reflects firm’s unique strengths and exclusive focus on supporting growth and success of credit unions across the country*

**San Diego, CA, and Lockport, NY** — January 11, 2022 — [CUSO Financial Services, L.P.](https://c212.net/c/link/?t=0&l=en&o=3207454-1&h=1367194007&u=https%3A%2F%2Fcusonet.com%2F&a=CUSO+Financial+Services%2C+L.P.) (“CFS”), a subsidiary of Atria Wealth Solutions, Inc. (Atria) today announced a multi-year agreement with Cornerstone Investment & Retirement Services to support and grow its investment services program. Cornerstone Investment & Retirement Services is the investment arm of Cornerstone Community Federal Credit Union (Cornerstone). Established in 1957, Cornerstone serves more than 45,000 members with over $570 million in assets from six branches throughout Western New York.

CFS has a singular focus on supporting the growth and success of investment programs for credit unions across the country and will soon be the only remaining third-party broker-dealer in the financial services industry that is solely dedicated to this segment of the financial institutions market.

“We strive for excellence, clarity and transparency in everything we do at Cornerstone. We also expect those same qualities from the broker-dealer that supports us. That’s why CFS was the clear choice for our investment program,” said Cornerstone CEO Eric Hepkins. “Our members look to us for a holistic approach to solving their evolving financial needs. CFS has the wealth management solutions and innovative technology that can help us fulfill those needs, and it also has a rich history of serving the unique needs of credit unions.”

Valorie Seyfert, President and Co-founder of CFS, said, “We’re thrilled to welcome Cornerstone to the CFS community and to help drive the next stage of growth and success for their investment services program. Cornerstone’s decision to align with CFS underscores our unique expertise as a firm that has focused entirely on serving credit unions for 25 years, equipping them with the comprehensive wealth management platform that its members can trust.”

“This decision by Cornerstone is the second partnership we’ve announced already this year. It reflects the strength of our current pipeline and the increasing number of credit unions that are recognizing our longstanding passion to help them drive material growth, fulfill member expectations and deliver greater value to the members and families they serve,” concluded Tami Cain, CFS Executive Director of Business Development.

**Technology Resources Augment Broader Value Proposition for Credit Unions**

Cornerstone members now have instant access to Clear1, an intuitive and co-branded member-facing portal with single-sign-on integration from the credit union’s home banking website, allowing members to view consolidated account activity and upload and access important documents in a secure storage environment.

CFS also provides financial professionals with access to holistic wealth management tools, including Contour, a comprehensive fee-based advisory platform, and Unio, our award-winning advisor platform with a fully integrated CRM and a paperless new account opening workflow.

The platform’s powerful reporting capabilities provide Cornerstone with deep analytics in real time, empowering the credit union to work in tandem with CFS program development experts to assess and enhance the investment program and its structure, improving member penetration and delivering a clear path to better member connectivity.

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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 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 nearly $40 billion in assets under administration and deliver 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://c212.net/c/link/?t=0&l=en&o=3207454-1&h=3552169819&u=https%3A%2F%2Fcusonet.com%2F&a=cusonet.com).

**About Cornerstone Investment & Retirement Services**

Cornerstone Investment & Retirement Services offers investment services to members of Cornerstone Community Federal Credit Union (Cornerstone). Established in 1957, Cornerstone serves 45,000 members from six branches throughout western New York. Cornerstone offers membership to anyone who lives, works, worships, attends school or volunteers in Niagara or Erie counties. For more information, visit [cornerstonecommunityfcu.org](http://cornerstonecommunityfcu.org/).

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