CUSO Financial Continues Robust Growth, Announcing New Partnership with IC Federal Credit Union

Third institution in first month of 2022 to join CFS underscores firm's expertise and singular focus on driving growth and success for credit union investment programs

San Diego, CA, and Fitchburg, MA — January 27, 2022 — CUSO Financial Services, L.P. (CFS), a subsidiary of Atria Wealth Solutions, Inc. (Atria) today announced a multi-year agreement with IC Federal Credit Union (IC) to support and grow its investment services program. Established in 1928, IC now operates seven branches throughout Massachusetts, serving more than 33,000 members with over $580 million in assets.

This announcement is CFS' third announcement in the new year, reflecting the strong momentum behind the firm as the industry leader in partnering with credit unions across the country. The broker-dealer's exclusive focus on supporting the growth and success of credit union investment programs helps them best serve their members' evolving financial needs and differentiates CFS within the credit union segment of financial institutions.

"Our primary focus as a credit union is anticipating the needs of our members and providing products and services that enrich their lives and promote financial wellness. We live and work in the same community as our members, so serving them is a responsibility we take very personally," said Chris Hendry, President & CEO of IC. "CFS provides us with the personalized support and world-class wealth management solutions we need to serve our members more effectively than ever before. The expertise, culture and innovation at CFS is unmatched."

Program and Advisor Development Experts Provide One-on-One Coaching

"I've personally known the leaders of IC for many years and am honored that they've chosen CFS to help them meet and exceed their members' needs," said Valorie Seyfert, President and Co-founder of CFS. "Their rich heritage of serving members throughout Massachusetts traces back nearly a century, and our experience and resources focusing on credit unions gives them the expertise, technology and dedicated support they need to enhance their member experience and grow a successful investment program."

CFS implements a collaborative, two-tiered approach to building investment programs. At the institution level, program development experts provide strategic guidance and support for credit union executives, while advisor development experts work with individual financial professionals on the tactical aspects of wealth management and business development.

"We have devoted 25 years to developing unmatched expertise that actually helps credit unions grow and are passionate about delivering a frictionless wealth management experience," said Tami Cain, CFS Executive Director of Business Development. "IC's reasons for joining us are very similar to the many other credit unions that have joined us over the past month. They recognize our passion and our ability to help them develop more meaningful connections with members and deliver a frictionless wealth management experience."

As the leaders of IC are intensely focused on enhancing its member experience, they will now be able to offer Clear1, an intuitive and co-branded member-facing portal with single-sign-on integration from the credit union's home banking website. Members can view consolidated, real-time snapshots of their entire portfolio, upload important documents for secure storage and seamlessly connect with their advisor through texting.

IC financial professionals also have access to the full suite of advanced wealth management tools available to every advisor in the Atria family, including Unio, the award-winning advisor platform with a fully integrated CRM and a paperless new account opening workflow, and Contour, a comprehensive fee-based advisory platform.

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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 over $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.

Credit unions and banks have contracted with CFS and SPF to make non-deposit investment products and services available to credit union members and bank customers. For more information, visit cusonet.com. For more information about Atria Wealth Solutions, visit atriawealth.com.

IC Federal Credit Union

Founded in 1928, IC Federal Credit Union serves the financial needs of over 33,000 members with seven branches throughout the six Massachusetts counties of Worcester, Middlesex, Franklin, Hampden, Hampshire and Norfolk. With over $580 million in assets, IC is committed to improving the well-being of its members by providing innovative products and services while promoting member education and community support through a team of caring, knowledgeable and empowered professionals. For more information, call 800-262-1001 or visit iccreditunion.org.

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