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CUSO Financial Announces New Partnership with Eglin Federal Credit Union

Military-focused credit union chooses CFS for technology and transparency

San Diego, CA, and Fort Walton, FL — January 4, 2022 — [CUSO Financial Services, L.P.](#) (“CFS”), a subsidiary of Atria Wealth Solutions, Inc. (Atria) today announced a multi-year agreement with Eglin Federal Credit Union (“EFCU”) to support and grow its investment services program, Eglin Wealth Management. Established in 1954, EFCU serves over 121,000 members with nearly \$2.8 billion in assets. The credit union is deeply committed to its Select Employee Groups (SEGs) and serving the financial needs of military and civilian personnel throughout the western Florida Panhandle.

EFCU joins a rapidly-increasing number of credit unions that have recently made a long-term strategic decision to join CFS to best serve their members’ retirement and investment needs.

“Our primary focus as a credit union is to find a partner who empowers us to take care of our members by providing them with a truly holistic approach to financial planning,” said EFCU Chief Strategy Officer Cathie Staton. “CFS was the clear choice for us because they were transparent throughout this due diligence process, forward-thinking in their vision for the future of wealth management and have 25 years of experience working with credit unions.”

CFS will soon be the only remaining third-party broker-dealer in the financial services industry that is solely dedicated to credit unions.

“EFCU has done a remarkable job serving its members, specifically its military SEG, with high-touch service throughout the past 67 years. We’re excited to partner with them and are confident that our 25 years of expertise helping credit unions stay ahead of their members’ evolving needs will serve EFCU well,” said CFS President and Co-founder Valorie Seyfert. “Our experience, dedicated support and technology provide them the ability to serve more members, a clear path to grow their investment program, and access to our long-standing, strategic partnerships — all so they can choose the right solution for each member.”

Eglin Wealth Management has access to the full suite of modern tools available to every financial professional and institution throughout the Atria family, including the award-winning Unio, an integrated advisor platform, Contour, a comprehensive fee-based advisory platform, and Clear1, an intuitive, co-branded member-facing portal that integrates with the credit union’s home banking system.

“The technology available to us at CFS is already transforming our investment program,” said Staton. “More importantly, it is enabling us to offer an even greater level of personalized support so we can stay closer and more connected to our members than ever before.”

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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. For more information, visit cusionet.com.

About Eglin Federal Credit Union

Eglin Federal Credit Union (“EFCU”) is a not-for-profit, member-owned institution serving over 121,000 members with nearly \$2.8 billion in assets. Established in 1954, the credit union operates from ten branch locations and offers membership to military and civilian personnel on Eglin Air Force Base, Hurlburt Field and Duke Field, and affiliates of Select Employee Groups in Okaloosa, Santa Rosa and Walton counties. For more information, visit eglinfcu.org.

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