

**CUSO Financial Announces New Partnership with Gulf Coast Educators Federal Credit Union**

*Texas credit union chooses CFS for its superior insight in the credit union vertical
and expertise in the education SEG*

**San Diego, CA, and Pasadena, TX** — October 6, 2021 — [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 [Gulf Coast Educators Federal Credit Union](https://www.gcefcu.org/) (“GCEFCU”) to support and grow its investment services program. Established in 1948, GCEFCU serves over 46,000 members with $1.2 billion in assets. As a closed SEG (special employee group) credit union, it is deeply committed to serving the financial needs of educators and school employees throughout the Houston, Texas, area.

“As our membership continues to grow, so does our need to provide members with expanded wealth management solutions. That’s one of several reasons that CFS was the clear choice for us,” said Eric Stegall, Chief Operating Officer of GCEFCU. “The technology at CFS is more than a digital solution. It truly enhances the entire experience for our members and empowers us to serve them with a holistic approach to financial planning. CFS also has extensive knowledge and experience in understanding the specialized needs of educators.”

GCEFCU 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. Members can view their account activity, upload important documents for secure storage and connect with their advisor through business texting.

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

“We are so excited to begin this partnership with GCEFCU. Their commitment to providing high-touch, personalized support to educators closely aligns with our vision as the only third-party broker-dealer solely dedicated to credit unions,” said Valorie Seyfert, President and Co-Founder of CUSO Financial Services. “For 25 years, we have focused on staying ahead of the evolving needs of credit unions. Our experience and resources allow us to offer them the best technology, a clear path to grow their investment programs, and the dedicated support they need to reach more members while providing an exceptional member experience.”

Dedicated program and advisor development professionals collaborate with credit unions in the CFS family. These broker-dealer experts are already working with GCEFCU on strategic business plans surrounding the credit union’s unique referral culture using BusinessOptimizer™, a powerful analytics engine within Unio that mines program data in real-time and pinpoints new business opportunities.

“CFS provides a completely differentiated experience for credit unions,” said Stegall. “Its combination of scale, service, culture and technology is already transforming our ability to better serve our members, deepening our relationships and offering greater insight 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 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 Gulf Coast Educators Federal Credit Union**

Gulf Coast Educators Federal Credit Union (GCEFCU) is a member-owned financial cooperative serving over 46,000 members with $1.2 billion in assets throughout the Houston, Texas, area. Established in 1948, the credit union offers membership to educators and individuals employed by any school district, charter or private school, or post-secondary institution in the state of Texas. Gulf Coast currently operates from seven branch locations and will soon open its eighth location in the Houston area. For more information, visit [gcefcu.org](https://www.gcefcu.org/).

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