

CUSO Financial and First Service Credit Union Announce New Partnership

Credit union-focus and proven track record for growth influence decision to join CFS

San Diego, CA, and Houston, TX — August 17, 2021 — [CUSO Financial Services, L.P.](#) ("CFS"), a subsidiary of Atria Wealth Solutions, Inc. (Atria) today announced a multi-year agreement with [First Service Credit Union](#) ("First Service") to support and grow its investment services program. Established in 1977, First Service provides financial services to 68,000 members with nearly \$900 million in assets throughout Houston, Texas, and surrounding areas.

"There were a number of factors that led to our decision to choose CFS," said Frank Halstead, Chief Risk Officer of First Service Credit Union. "First and foremost is their proven track record of supporting and growing credit union investment programs. They are the only third-party broker-dealer solely dedicated to credit unions, with the clear focus on helping us deliver the top-notch, personalized services that our members deserve. The unique combination of CFS' scale, service culture and award-winning technology made this a clear choice for us."

First Service is among the 300+ CUNA-affiliated credit unions forced to make a long-term strategic decision on how to best serve their members as a result of CUNA's transaction with LPL.

"We are thrilled and honored that First Service chose CFS and found our offering to be superior among the choices before them. This is a pivotal moment for many credit unions. I applaud First Service for performing the diligence necessary to choose the firm that best aligns with its vision for serving its members," said Valorie Seyfert, President and Co-Founder of CUSO Financial Services. "We've been bringing tremendous value to credit unions for 25 years. Our culture delivers high-touch, personalized support, making it easier for them to engage in more meaningful interactions with their members."

First Service financial professionals gain access to the full suite of modern tools available to every financial institution and professional throughout the Atria family, including the award-winning Unio, an integrated advisor platform, Contour, a comprehensive fee-based advisory platform, and Clear1, an intuitive member-facing portal that can be co-branded and integrated into a credit union's home banking system.

Through its partnership with CFS, First Service also gains resources and tools focused on growth and development. 'Business Optimizer', a powerful analytics engine within Unio, mines program data in real time to identify revenue-generating opportunities. Coupled with dedicated program and advisor development professionals, this combination of analytics and resources has proven to drive material program growth.

"The needs of credit unions and their members are constantly evolving. As a result, our technology must continually evolve too. Based on real-time feedback mechanisms from financial professionals, we are constantly improving our platform to offer the best technology available to credit union programs so they can meet and exceed the needs of their members," says Eugene Elias, Jr., COO and Founding Partner of Atria. "Our design principles are what differentiates our technology. We focus on programs and their financial professionals so they can develop more meaningful personal connections with their members and clients."

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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.

About First Service Credit Union

First Service Credit Union (First Service) is a member-owned financial cooperative operating from ten branch locations throughout the Houston, Texas, area. Established in 1977, the credit union serves more than 68,000 members with nearly \$900 million in assets. Membership is available to the family of existing members and those who live, work, worship or attend school in Harris, Waller or Fort Bend Counties or Conroe or Magnolia Independent School Districts. For more information, visit fscu.com.

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