

**Wescom Financial Services Announces Transition
of Broker-Dealer Services to CUSO Financial Services**

*Nearly $6 billion credit union continues to grow personalized and innovative wealth management services for its members through partnership with CFS*

**SAN DIEGO AND PASADENA, CA — December 8, 2022** — [CUSO Financial Services, L.P.](https://cusonet.com/) (CFS), a subsidiary of Atria Wealth Solutions, and [Wescom Credit Union](https://www.wescom.org/) (Wescom) announced today that Wescom Financial Services (WFS) will transition its broker-dealer services to CFS under a dual program model. CFS will continue to partner with WFS in a dual program service model in which CFS will provide the technology platform, investment products and solutions, training and compliance oversight for their investment program. Established in 1934, Wescom serves more than 200,000 members with nearly $6 billion in assets from its 24 branches throughout Southern California.

**Enabling a higher-touch member experience**

“Our mission as a financial institution is providing personalized and innovative service to help our members achieve their financial goals and freedom. The transition to a dual program at CFS allows us to focus even more on the member experience and ensure we are meeting our members exactly where they want to be met. There is a great deal of complexity running a broker-dealer and having a partner like CFS to manage the broker-dealer complexities so we can continue to focus exclusively on the member experience is our ideal solution,” said Jonathon Allen, WFS President.

Mr. Allen continued, **“**We are thrilled to transition to our new dual program relationship with CFS, which gives us access to award-winning technology for both our members and financial professionals, first-class compliance teams, service and support empowered by technology but powered by people, a robust operations infrastructure and, most importantly, CFS’ unmatched expertise in the credit union vertical.”

**A seamless transition for Wescom members**

WFS’ transition to a dual program relationship with CFS does not impact members’ investments or the way they access accounts, and members will continue to work with their existing financial professional.

“Our relationship with Wescom is one of our most long-standing and cherished relationships. For more than two decades, we’ve grown and evolved together as the marketplace and regulatory environment have also evolved, so we are honored that Wescom is continuing its partnership with our firm,” said Valorie Seyfert, CFS President & Co-Founder. “We are pleased to take this next step with Wescom and look forward to another two decades of collaboration and partnership together.”

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**About CUSO Financial Services, L.P.**

CUSO Financial Services, L.P. (CFS) and Sorrento Pacific Financial, LLC (SPF) are independent wealth management subsidiaries of Atria Wealth Solutions and provide brokerage and advisory services. 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](https://c212.net/c/link/?t=0&l=en&o=3207454-1&h=3552169819&u=https%3A%2F%2Fcusonet.com%2F&a=cusonet.com). For more information about Atria Wealth Solutions, visit [atriawealth.com](https://www.atriawealth.com/).

**About Wescom Credit Union**

Since 1934, Wescom Credit Union has been dedicated to helping people throughout Southern California build better lives. Headquartered in Pasadena, California, Wescom has 24 branches and offers advanced digital banking tools that provide banking solutions to more than 200,000 members. Benefits include lower loan rates, higher savings yields, reduced fees, and a robust network of branches and ATMs. Wescom is insured by NCUA. As a wholly owned subsidiary of Wescom Credit Union, Wescom Financial Services (WFS) offers full-service investment options to Wescom members, delivering the highest standard of service and personalized attention. For more information, please visit [wescom.org](https://wescom.org/).

Investment products and services offered through Wescom Financial Services, LLC (WFS), a Registered SEC Investment Advisor, broker-dealer, and a wholly owned subsidiary of Wescom Credit Union. Registered Representatives are employed by and registered through WFS (Member FINRA/SIPC).

Investments are not NCUA/NCUSIF insured, not credit union guaranteed, and may lose value.

Wescom Financial Services CA Insurance License #0E36340.

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