

**CUSO Financial Announces Partnership with Harvard University Employees Credit Union**

$1 billion university credit union chooses wealth management firm for its significant experience with

start-up programs

**San Diego, CA, and Cambridge, MA** — May 23, 2023 — CUSO Financial Services, L.P. (CFS), a subsidiary of Atria Wealth Solutions, Inc. (Atria) is pleased to announce a multi-year agreement with Harvard University Employees Credit Union (HUECU) to provide wealth management services to their members. HUECU exclusively serves the Harvard community, including the staff, students and alumni of Harvard University, Harvard teaching hospitals and other affiliated organizations. Established in 1939, the credit union manages more than $1 billion in assets and serves more than 52,000 members.

Craig Leonard, HUECU President and CEO said, “Our members are asking for expanded financial services, and CFS has a proven track record in the industry when it comes to implementing wealth management programs for credit unions. It’s clear that CFS shares our same values and mission — to offer members the support and options they can’t get anywhere else.”

“For nearly 30 years, our objective has been to deliver unmatched wealth management solutions to our financial institution partners, enabling them to create an exceptional experience for their members,” said Kevin Mummau, Co-Head of Atria’s Financial Institution channel. “We’re excited to partner with HUECU and continue our shared passion for educating members on the importance of planning for their financial future. We know members want more than just investment advice, they want guidance throughout their life, and we look forward to supporting HUECU on this journey.”

Tom Montilli, Chief Experience Officer at HUECU said, “CFS’ expertise in building and growing wealth management programs from the ground up was a primary driver in our decision to partner with them. The ability to expand our credit union’s digital presence was also an important factor. We wanted to keep our brand front and center and at the same time, offer the personalized support and solutions that our members expect. We found all that and more through CFS.”

Through investments in people, capabilities and services, CFS offers financial institutions a comprehensive product platform, extensive practice management resources, and a broad array of tools like the Clear1 portal and mobile app that empower members and provides real-time data and home banking integration. These solutions and services drive scale and create efficiencies so credit unions and banks are positioned to grow and best serve their members.

CFS offers [four unique program models](https://atriawealth.com/credit-union-banks/?utm_campaign=Press%20Releases&utm_source=haventower&utm_term=huecu) that give credit unions like HUECU and banks the flexibility to choose how they partner as their needs and strategy evolve.

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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 about Atria Wealth Solutions, visit [atriawealth.com](http://www.atriawealth.com/?utm_campaign=Press%20Releases&utm_source=haventower&utm_term=huecu).

**Harvard University Employees Credit Union**

Founded in 1939, Harvard University Employees Credit Union serves more than 52,000 members of the Harvard community, including the staff, students and alumni of Harvard University, Harvard teaching hospitals and other affiliated organizations. The credit union has over $1 billion in assets. They provide members with access to world-class financial services, loan programs, and financial education resources.

For more information, visit huecu.org.

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