**CUSO Financial Announces New Partnership with Mobiloil Credit Union**

*$1 billion Texas-based financial institution joins broker-dealer with singular focus on credit unions*

**San Diego, CA, and Beaumont, TX** — **May 16, 2023**— CUSO Financial Services, L.P. (CFS), a subsidiary of [Atria Wealth Solutions, Inc](mailto:http://www.atriawealth.com?utm_campaign=Press%20Releases&utm_source=haventower&utm_term=mobiloilcu). (Atria), announces a multi-year agreement with Mobiloil Credit Union (Mobiloil) to support and grow its wealth management program. Established in 1935 as Magnolia Employees Beaumont Texas Federal Credit Union, Mobiloil serves nearly 75,000 members with over $1 billion in assets from twelve branches throughout southeastern Texas.

“For nearly 90 years, we have been committed to enriching our members’ lives one experience at a time, and our new partnership with CFS empowers us to do that at a much higher level and with significantly more ease,” said Mobiloil President and CEO John Doucet. “For 26 years, the CFS team has focused on serving credit unions, so they deeply understand our needs as a financial institution and can empower us to serve our members with a truly holistic approach to financial planning.”

Mobiloil members now have access to the Clear1 portal and mobile app, an intuitive and co-branded member portal and mobile app built with a single sign-on integration from the credit union’s home banking website, designed to provide a seamless connection between members’ wealth management services and their credit union’s services.

Mobiloil also welcomes financial professional Marioreen “Mario” Gibson to their wealth management program. Gibson brings over 32 years of experience, including 15 years at CUNA Brokerage Services and, most recently, LPL Financial.

“I chose Mobiloil Credit Union’s wealth management program for two very specific reasons: their consistent integrity and focus on top-notch service. Next to people’s health is their wealth, and Mobiloil’s approach to ensuring members’ wealth goals are supported is so reflective of my own passion,” said Gibson. “It became clear very quickly that CFS’ values and integrity are aligned with ours, and they are involved every step of the way. The executive team is always available, and they are committed to partnering with us to help our program grow.”

Tami Cain, CFS Executive Director of Business Development, points to the firm’s focus on credit unions as a leading factor in Mobiloil’s decision to partner with CFS. “We’re thrilled to welcome Mobiloil to the CFS community and to help drive growth and success for their wealth management program. Their decision to align with CFS underscores our unique expertise in the credit union vertical and equips them with our comprehensive solutions for its members,” she concluded.

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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 (Atria). 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 CFS and Atria’s Financial Institution channel, visit [atriawealth.com](http://www.atriawealth.com?utm_campaign=Press%20Releases&utm_source=haventower&utm_term=mobiloilcu).

**About Mobiloil Credit Union**

Founded in 1935, Mobiloil Credit Union serves the financial needs of nearly 75,000 members living and working in southeastern Texas. With 11 branches and over $1 billion in assets, Mobiloil’s mission is to enrich people’s lives, one experience at a time. For more information, visit [mobiloilcu.org](https://www.mobiloilcu.org/).

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