

**CUSO Financial Services Welcomes Allegent Community Federal Credit Union**

*$278 Million Credit Union is Third Financial Institution to Join CFS from LPL Financial this Month*

**San Diego, CA, and Pittsburgh, PA** — **June 13, 2023**— CUSO Financial Services, L.P. (CFS), a subsidiary of Atria Wealth Solutions, Inc. (Atria), is pleased to announce the addition of Allegent Community Federal Credit Union (Allegent). Allegent serves more than 20,000 members with more than $278 million in assets from five branches in Pennsylvania. Allegent joins CFS from LPL Financial.

“We look forward to growing our wealth management business through our partnership with CFS. CFS’ extensive industry experience working with financial institutions will help us differentiate ourselves and enable us to offer our members services, solutions and efficiencies that go beyond just investment advice. Our members will benefit from the exceptional experience that our combined firms can deliver,” said Angelo Lucatorto, Allegent CEO.

By relying on CFS for all aspects of their wealth management program, Allegent can concentrate on raising member awareness regarding these offerings and the larger set of solutions to meet their members’ needs. Under this arrangement, CFS is the employer of Allegent’s financial professionals and program managers. CFS’ tailored support and member-first approach is made possible by the firm’s award winning and state-of-the-art platforms, and its robust advisor development programs, member experience capabilities and compliance oversight.

“Like us, Allegent is tirelessly devoted to delivering a wealth management experience that is unmatched in the industry. We deeply understand that each credit union’s needs are as unique as the members it serves. For nearly 30 years, we’ve been fulfilling our commitment to help our partners do more than meet member expectations, but exceed them through personalized support and tailored solutions,” said Brian Bichler, Co-Head, of Atria’s Financial Institution channel.

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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, investment advisors and subsidiaries of Atria Wealth Solutions with over $40 billion in assets under administration. Established in 1997, CFS and SPF specialize in placing, supporting and providing customized wealth management solutions to over 200 banks and credit unions by delivering a sophisticated set of tools, services and capabilities for wealth management programs.

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

**About Allegent Federal Credit Union**

Founded in 1934 with only ten federal government employees, Allegent Community Federal Credit Union has grown to more than 20,000 members across Pennsylvania. Membership in Allegent is open to anyone who lives, works, worships or attends school in Allegheny, Beaver, or Butler Counties of Pennsylvania. Learn more at <www.allegentfcu.org>.

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