

**CUSO Financial Services Announces New Partnership with Clearview Federal Credit Union**

*$1.8 Billion Credit Union Joins Financial Institution Focused Wealth Management Firm*

**San Diego, CA, and Pittsburgh, PA** — **June 6, 2023**— CUSO Financial Services, L.P. (CFS), a subsidiary of Atria Wealth Solutions, Inc. (Atria), is pleased to announce the addition of Clearview Federal Credit Union. Clearview serves over 117,000 members with more than $1.8 billion in assets from 18 financial centers throughout Southwestern Pennsylvania. Clearview joins CFS from LPL Financial.

"We're excited about the future of Clearview and CFS. It was important to us to partner with a broker-dealer that understands our vision of helping our members enjoy a better life and will empower us to deliver the solutions that exceed their needs," said Lisa Florian, President and CEO of Clearview.

Costas Grekis, Clearview Vice President of Wealth Management, added, "As members' expectations evolve, we knew we needed the support of a wealth management firm with the industry experience and agility to adapt. CFS is an innovative, responsive, and accountable firm delivering all that and more to our team and members."

Because each financial institution is different, CFS understands the need for customization and personalization. That commitment has resulted in the development of capabilities that provide a competitive advantage for each program, making it easier to do business, creating efficiencies and transforming the member relationship. Built on choice and flexibility, CFS propels financial institutions to exceed member expectations through a sophisticated combination of industry-leading products, strategic program management, comprehensive advisory solutions and award-winning technology. Unio™, a proprietary platform, seamlessly integrates the entire wealth management ecosystem resulting in time savings and better support for financial professionals and members. Through the Clear1 portal and mobile app and its single sign-on integration with Clearview’s home banking website, members have access to their credit union accounts and their investment portfolio.

“We’re honored to have a credit union of Clearview’s caliber join our team. We work diligently to create unique experiences for each of our financial institutions and Clearview is no exception. From the beginning, our focus has been to understand their vision and challenges, and then develop a customized approach which includes an in-person training initiative, specialized support and smart, seamless solutions proven to enrich the financial professional and member relationship. Together, our opportunities are limitless,” 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 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=clearview).

**About Clearview Federal Credit Union**

Clearview Federal Credit Union has been in operation since 1953 and serves more than 117,000 members with reported assets valued at over $1.8 billion as of May 2023. Membership in Clearview is open to individuals who live, work, worship, volunteer or attend school in the Southwestern Pennsylvania community, which includes Allegheny, Armstrong, Beaver, Butler, Fayette, Greene, Indiana, Lawrence, Washington, and Westmoreland counties. Membership is also open to immediate family members of current Clearview members. Clearview Federal Credit Union is federally insured by the National Credit Union Administration and is an Equal Housing Lender. Visit clearviewfcu.org for more information.

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