



## **We Florida Financial Chooses CUSO Financial Services**

\$750 million credit union is sixth to join CFS from LPL this Quarter

**San Diego, CA, and Margate, FL** — July 20, 2023 — CUSO Financial Services, L.P. (CFS), a subsidiary of Atria Wealth Solutions, Inc. (Atria) is pleased to announce an agreement with We Florida Financial. Established in 1952, We Florida Financial has over \$750 million in assets and serves more than 45,000 members.

“We look forward to working with a wealth management firm that is solely focused on financial institutions. We reached a point in our history where we wanted to make a change to grow and so we chose a wealth management provider which has a proven track record with credit unions like ours. Our focus going forward will be to expand our member services and build a wealth management program that will lead in the marketplace,” said Robert D. Ramirez, President and CEO of We Florida Financial.

Today’s member expectations demand that financial institutions differentiate themselves. CFS offers options and flexibility through [four unique program models](#). Through CFS’ Managed Program affiliation model, We Florida Financial has access to more member-focused informational and educational opportunities, co-branding capabilities and award-winning tools such as the Clear1 mobile app which seamlessly connects the member and financial professional. Through Unio™, an integrated platform, and other innovative products and investment solutions, We Florida Financial professionals and members also have access to investments and credit union account information at their fingertips.

“We take pride in getting to know each financial institution and the needs of its members. Everything we do is designed to deliver a customized experience that can help We Florida Financial. Our relationship allows We Florida Financial to focus on the member experience, enhance existing the member experience and deliver greater value, while CFS focuses on the implementation and growth of We Florida Financial’s wealth management program. We are excited for our future together and all we can accomplish,” said Kevin Mummau, 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. For more information about CFS, SPF and Atria Wealth Solutions, visit [atriawealth.com](http://atriawealth.com).

### **About We Florida Financial**

We Florida Financial is a cooperatively owned, not-for-profit credit union with over 45,000 members and over \$750 million in assets. Founded in 1952 for the benefit of municipal employees in Broward County, We Florida Financial now serves individuals and small businesses in 46 Florida counties

from Jacksonville to Key West. Currently ranked as one of the top credit unions in the region, We Florida Financial offers a full range of competitive deposit and loan products to meet the needs of our diverse communities. We Florida Financial also has its own foundation that it funds and supports. The We Give Back Foundation aims to improve the quality of life of those in their local, underserved communities for over 70 years. For more information, visit [WeFloridaFinancial.com](http://WeFloridaFinancial.com) and [WeGiveBackFL.org](http://WeGiveBackFL.org).

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**CONTACT INFORMATION**

Haven Tower Group

Julian Arenzon

424 317 4861

[jarenzon@haventower.com](mailto:jarenzon@haventower.com)