

CUSO Financial Services Continues Growth Momentum in New Partnership with \$2.3 Billion Capital Credit Union

Wisconsin-based Financial Institution is Latest to Join CFS

San Diego, CA — July 6, 2023 — CUSO Financial Services (CFS), a subsidiary of Atria Wealth Solutions, Inc. (Atria), is thrilled to announce a multi-year partnership with Capital Credit Union (Capital), marking another significant step in CFS's ongoing growth. Capital Credit Union, established in 1927 and serving over 120,000 members with \$2.3 billion in total credit union deposits across Wisconsin through its 24 branches, has decided to join CFS, transitioning from its previous affiliation with LPL Financial.

Capital Credit Union's President and CEO, Laurie Butz, was clear in her rationale behind selecting CFS as the partner to grow Capital's investment services program. "We were looking for a partner who fully understands and embraces the experience we are looking to create for our members. We have been serving the members of our community for nearly a century, and we needed to identify a firm that understands the credit union culture and changing needs of those we serve. The ability to broaden our program through people, technology and investment products while maintaining and preserving the core culture of our credit union was imperative. CFS shares a passion for the credit union mission of people helping people which makes them the right partner for us today and well into the future," said Butz.

Kevin Mummau, Co-Head of Atria's Financial Institution channel, said, "We are incredibly excited about our new partnership with Laurie and the Capital team and helping Capital serve its members. Capital's strategic objectives align perfectly with CFS's core strengths and our commitment to supporting credit unions in developing their investment programs and ensuring an unmatched member experience. Drawing upon our extensive history of close collaboration with financial institutions spanning nearly three decades, we are uniquely positioned to offer a tailored and differentiated solution for Capital and its members. Capital will gain access to an expanded range of products and solutions through this partnership and work closely with our team to develop targeted marketing strategies, leveraging our award-winning, fully integrated financial professional and member technology platform. Together, our ultimate goal is to deliver a truly distinctive member experience that lives up to the exceptional reputation of Capital Credit Union."

At CFS, financial institutions benefit from an integrated platform that fosters growth and strengthens member connections. CFS's value proposition extends beyond technology, including unparalleled expertise, extensive experience working with financial institutions for nearly three decades, a hands-on approach, accessible support and training, innovative solutions and unparalleled execution.

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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.

About Capital Credit Union

Capital Credit Union is headquartered in Green Bay, Wis., with assets of more than \$2.3 billion. With branches located throughout Northeast Wisconsin, the credit union serves more than 120,000 members in the greater Green Bay, Fox Valley, and Heart of the Valley areas, as well as Greenville, Oshkosh, Freedom, Shawano and Sturgeon Bay. You can find Capital Credit Union on Facebook, Instagram, and LinkedIn, or visit their website at capitalcu.com.

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