

**CUSO Financial Services Welcomes Northern Credit Union**

$600 Million Credit Union Cites Experience in Personalized Member Solutions
as Reason for Joining CFS

**San Diego, CA, and Watertown, NY** — August 1, 2023 — CUSO Financial Services, L.P. (CFS), a subsidiary of Atria Wealth Solutions, Inc. (Atria) is pleased to announce an agreement with New York-based Northern Credit Union (Northern). Established in 1955, Northern now serves 45,000 members with nearly $600 million in assets. Northern joins CFS from LPL Financial.

“Our members’ expectations continue to evolve, so we knew we needed to find a partner focused on all the many unique retirement planning, investment services, and insurance needs of our membership with a commitment to exceeding their expectations,” said Dan St. Hillaire, CEO at Northern Credit Union. “It’s clear CFS is a like-minded partner with the expertise we need to grow our investment services program and elevate the experience we offer our members.”

“We’re honored that Northern chose to partner with CFS. We firmly believe that the key to a successful wealth management program lies in fostering a strong connection between financial professionals, their members, and the credit union, all based on shared values. To achieve this, we’ve made it a priority to deliver our program management expertise and award-winning platform to create deeper member connections through exceptional service and digital capabilities that bring members and financial professionals together.,” said Brian Bichler, Co-Head of Atria’s Financial Institution channel.

CFS’ innovative solutions such as Unio™, produce measurable efficiencies and insights for financial professionals. In addition to a leading advisor platform, financial professionals can engage with their members through the fully integrated and award-winning Clear1 member portal and mobile app which provides members with more customizable information and access to investment and credit union accounts. CFS delivers an integrated approach to holistic wealth management advice through customized support, tools and resources.

Kevin Mummau, Co-Head of Atria’s Financial Institution channel, added, “We’re in this business to help people and we design our solutions to elevate the member and financial professional relationship. We look forward to partnering with Northern to enrich and strengthen its member relationships and build a transformative wealth management business for the future.”

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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://www.atriawealth.com?utm_campaign=Press%20Releases&utm_source=haventower&utm_term=northerncu).

**About Northern Credit Union**

Northern Credit Union is a growing, federally insured financial institution and a leading provider of a full range of financial services to anyone who lives, works, worships or regularly conducts business in Jefferson, Lewis, St. Lawrence, Oswego, Clinton, Franklin, Onondaga and Madison Counties in New York. Serving the financial needs of more than 45,000 members, Northern Credit Union is driven to improve the financial lives of those they serve through empowerment and personalized solutions. Visit Northern Credit Union at [mynorthern.com](https://www.mynorthern.com/), call or text (315) 782-0155 to learn more.

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