

Navy Federal Credit Union Renews Partnership with CUSO Financial Services

*Largest US credit union signs multi-year agreement
with financial institution-focused wealth management solutions provider*

San Diego, CA, and Vienna, VA — November 30, 2023 — CUSO Financial Services, L.P. (CFS), a subsidiary of Atria Wealth Solutions, Inc. (Atria), proudly announces the renewal of its multi-year agreement with Navy Federal Investment Services (NFIS) a subsidiary of Navy Federal Credit Union (Navy Federal). Established during the Great Depression, Navy Federal is the largest credit union in the United States, serving 12.5 million members from all military branches, the Department of Defense, and their families (current and retired.) Operating 355 branches worldwide, Navy Federal has \$157 billion in assets and remains focused on being the most preferred and trusted financial institution serving the military and their families.

“The strategic partnership we have formed with CFS over the past 15 years has helped us build our investment services division, and deliver a superior experience for our members,” said Diane Young, Chief Operating Officer of Navy Federal Financial Group. “CFS understands the credit union culture as well as the role advanced technology, financial planning and exceptional service plays in fostering relationships and delivering investment solutions to meet the needs of our unique members no matter how complex.”

CFS' award-winning proprietary technology platform, Unio, in conjunction with the client portal, Clear1, offers an unmatched degree of flexibility, enabling the customization of capabilities to align with the elevated expectations of Navy Federal members and NFIS's financial professionals. Examples of such noteworthy initiatives include data exchanges designed to support member campaigns, automated tasks triggered by the availability of new leads and the presentation of NFIS financial professional teams to comprehensively support the needs of Navy Federal's valued members.

“We are honored to partner with an organization like Navy Federal that serves and supports the members and families of our armed forces. For the last thirty years, our exclusive focus has been on credit unions and banks. CFS and Navy Federal were built to make a difference in people's lives and by ensuring we have the right people, technology, service and culture in place to deliver for our partners and their members. We look forward to continuing to work together with Navy Federal to empower NFIS's financial professionals to provide comprehensive quality financial advice to their members for many years to come,” said Brian Bichler, Co-Head of Atria's Financial Institution channel.

Kevin Mummau, Co-Head of Atria's Financial Institution channel, added "We are thrilled to extend our partnership with Navy Federal. This is a relationship business, and it's all about the members and programs we serve. Providing innovative technology and industry-leading expertise that align with today's leading credit union objectives is at the center of our business. The goals and aspirations of CFS and Navy Federal are in alignment, creating an unparalleled experience to best serve and support the members of Navy Federal.”

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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 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.

About Navy Federal Investment Services

Navy Federal Financial Group (NFFG) was established in 1999 as a wholly owned subsidiary of Navy Federal Credit Union with the goal of offering a wider range of financial services to its members. NFFG operates through its subsidiary, Navy Federal Investment Services (NFIS) – a registered securities broker-dealer and registered investment advisory firm, to cater to the financial needs of Navy Federal members, their families, and the military community. NFIS provides personalized financial planning, educational seminars, investment tools, insurance coverage, trust planning and services, and digital platforms. For further information, please visit navyfederal.org/nfis.

About Navy Federal Credit Union

Established in 1933 with only seven members, Navy Federal now has the distinct honor of serving over 12 million members globally and is the world's largest credit union. As a member-owned and not-for-profit organization, Navy Federal always puts the financial needs of its members first. Membership is open to all Department of Defense and Coast Guard Active Duty, veterans, civilian and contractor personnel, and their families. Dedicated to its mission of service, Navy Federal employs a workforce of over 22,500 and has a global network of over 350 branches. For more information about Navy Federal Credit Union, visit navyfederal.org. Federally insured by NCUA. Equal Opportunity Employer.

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