



## **Largest Credit Union in Hawaii Renews Partnership with CUSO Financial Services**

**\$2.3 Billion credit union cites CFS' investment program experience, technology and service for renewal**

**San Diego, CA, and Honolulu, HI** — December 5, 2023 — CUSO Financial Services, L.P. (CFS), a subsidiary of Atria Wealth Solutions, Inc. (Atria) is pleased to announce the renewal of its partnership with HawaiiUSA Federal Credit Union (HawaiiUSA). Established in 1936, HawaiiUSA serves more than 134,000 members with more than \$2.3 billion in assets.

A partner with CFS for 20 years, HawaiiUSA is the largest credit union in Hawaii. Greg Young, President and CEO at HawaiiUSA, said “We are grateful for the relationship we have with CFS. The engagement and attention we have received over the years has empowered our team and resulted in a successful program. Through CFS, we can provide our financial professionals with innovative tools, exceptional service and the technology they need to support our members’ goals.”

CFS delivers an integrated approach to holistic wealth management advice through industry leading expertise, innovative technology and premium support and services. CFS’ solutions such as Unio™, produce measurable efficiencies and insights for financial professionals as to how to create exceptional member experiences and grow their practices.

In addition to a leading advisor platform, financial professionals introduce Clear1, providing members with a range of benefits, including customizable portfolio displays, insights into their accounts, a secure document repository, one-click access to their financial professionals, and more. Importantly, Clear1 is seamlessly integrated within the home banking interface and aligns with HawaiiUSA's branding, providing members with easy access to information and their investment and credit union accounts.

“We’re proud of our partnership with HawaiiUSA and look forward to contributing to their success for many years to come. With nearly 30 years of experience in the industry, we don’t just promise personalized support, we deliver it. We pride ourselves on being available to our clients to guide them through all challenges and opportunities, and through our innovative solutions such as Unio™ and Clear1, credit unions like HawaiiUSA, operate efficiently and effectively, while focusing on what really matters, deepening the relationship between members and financial professionals. We are grateful for HawaiiUSA's confidence in our abilities and the potential we have to achieve shared goals.” 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 HawaiiUSA**

**HawaiiUSA Federal Credit Union** is Hawaii's largest credit union. Serving individuals and businesses through 14 branch locations statewide and convenient online services, HawaiiUSA is dedicated to the financial wellness of more than 134,000 members.

As a nationally and locally acclaimed, award-winning credit union, HawaiiUSA is a driving force in the community as a leader and visionary around sustainable financial health for individuals and businesses, understanding that their success contributes to a thriving community.

Originally opened in 1936 as a credit union for educators, for nearly 90 years HawaiiUSA has inspired a culture of giving that is rooted in education and has since expanded to other areas of community need that impact financial health including healthcare, housing, and hunger. To learn more, please visit <https://www.hawaiiusafcu.com/>.

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