



CUSO Financial Services and Sorrento Pacific Financial Celebrate 32 Financial Institution Partnerships in 2023, Representing \$240 Billion in Total Assets

16 new institutions join CFS/SPF in 2023 while 16 renew partnerships

San Diego, CA — January 9, 2024 — CUSO Financial Services (CFS) and Sorrento Pacific Financial (SPF) subsidiaries of Atria Wealth Solutions, Inc. (Atria), are pleased to announce the formation of 16 new strategic partnerships with credit unions and banks, alongside the renewal of 16 existing financial institutions in 2023. Representing a combined asset base of nearly \$240 billion and serving close to 15 million members and clients, these partnerships underscore CFS/SPF's continued momentum as the destination of choice for wealth management programs in the credit union and community bank verticals.

With nearly three decades of an exclusive focus on financial institutions, CFS and SPF have established themselves as trusted partners for financial institutions seeking comprehensive investment and wealth management solutions. These 16 newly formed partnerships and 16 renewals represent an exciting opportunity for CFS and SPF to enhance their expertise and provide an integrated technology platform and unparalleled support to an even wider network of banks and credit unions.

"In their partnerships with our firm, these forward-thinking institutions gain access to a robust suite of products and solutions tailored to their unique needs. Our blend of technology, intellectual expertise and product solutions, coupled with unparalleled execution, ensures the highest level of service and support," said Kevin Mummau, Co-Head of Atria's Financial Institution channel.

Brian Bichler, Co-Head of Atria's Financial Institution channel, added, "We are thrilled to welcome these esteemed banks and credit unions into the Atria family. Each new partnership and renewal represents a shared vision of growth, innovation and service. Together, we are poised to drive success, strengthen member relationships and help these financial institutions achieve their strategic objectives."

New Partnerships Announced in 2023

- Allegent Community Federal Credit Union
- Bank of Hawaii
- BlueOx Credit Union
- Capital Credit Union
- Clearview Federal Credit Union
- Harvard University Employees Credit Union
- I.L.W.U. Federal Credit Union
- Kemba Credit Union
- Rave Financial Credit Union (formerly Mobiloil)
- North Central Area Credit Union
- Northern Credit Union
- One Credit Union

- Polish & Slavic Federal Credit Union
- Vermont State Employees Credit Union
- We Florida Financial Credit Union
- West-Aircomm Federal Credit Union

Renewals Announced in 2023

The following banks and credit unions proactively renewed partnerships this year:

- Coastal Federal Credit Union
- Cornerstone Community Financial Credit Union
- Credit Human Federal Credit Union
- Dedham Savings
- Firefighters First Federal Credit Union
- First Commonwealth Federal Credit Union
- Grow Financial Federal Credit Union
- HawaiiUSA Federal Credit Union
- Navy Federal Credit Union
- NE PA Community Federal Credit Union
- New England Federal Credit Union
- Selco Community Credit Union
- Skyla Credit Union
- Thumb Bank & Trust
- University of Kentucky Federal Credit Union
- Water and Power Community Credit Union

The formation of these new partnerships, coupled with the firm's proactive renewals, further cements CFS/SPF's position as frontrunners in investment and wealth management solutions and also reflects the deep trust and confidence that financial institutions place in the firm's ability to deliver customized, state-of-the-art solutions.

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About CUSO Financial Services and Sorrento Pacific Financial

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. For more information about CFS/SPF and Atria, please visit atriawealth.com.

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