

Cetera Welcomes Eglin Federal Credit Union




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Cetera Financial Group →
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Florida-based credit union with 70-year track record to collaborate with Cetera Financial Institutions to grow and deliver member-focused investment program

SAN DIEGO, Nov. 14, 2024 /PRNewswire/ -- **Cetera Financial Group**, the premier financial advisor Wealth Hub, announced today Eglin Federal Credit Union has entered into a networking agreement with Cetera Financial Institutions in the delivery of its member-focused investment program, Eglin Wealth Management. Based in Fort Walton Beach, FL, Eglin Federal Credit Union was founded in 1954 and serves nearly 125,000 members with more than \$2.8 billion in assets, as of September 30, 2024.

"We welcome the Eglin team to the Cetera family and appreciate the trust and confidence they have placed in our capabilities and in achieving our shared goals together," said LeAnn Rummel, president and CEO of Cetera Investment Services. "We look forward to helping the Eglin team expand and enhance their investment program and provide more members with financial planning and wealth management services for years to come."

"Cetera shares the credit union philosophy of people helping people, and they are committed to delivering excellent service," said Cathie Staton, President and CEO at Eglin Federal Credit Union. "Cetera aligns with our mission and culture, and we look forward to a bright future together serving our members. Their 

expertise supporting credit unions, and their excellent reputation gives us the confidence that this was the right move for Eglin Federal Credit Union and Eglin Wealth Management."

Cetera Financial Institutions is a community within Cetera Investment Services that supports the investment programs of over 450 banks and credit unions. Cetera Investment Services is celebrating its **40-year anniversary** in 2024, and with nearly 40 renewals signed through July 2024, Cetera Financial Institutions' current retention rate is 99 percent for all institutions.

Click here for more information about Cetera Financial Institutions.

About Cetera

Cetera Financial Group, which is owned by Cetera Holdings (collectively, Cetera), is the premier financial advisor Wealth Hub where financial advisors and institutions optimize their control and value creation. Breaking away from a commoditized and homogenous IBD model, Cetera offers financial professionals and institutions the latest solutions, support, and services to grow, scale, or transition with a merger, sale, investment, or succession plan. Cetera proudly serves independent financial advisors, tax professionals, licensed administrators, large enterprises, as well as institutions, such as banks and credit unions, providing an established and repeatable blueprint for scalable growth.

Home to approximately 12,000 financial professionals and their teams, Cetera oversees more than \$521 billion in assets under administration and \$224 billion in assets under management, as of June 30, 2024. In a recent advisor satisfaction survey of nearly 35,000 reviews, Cetera's Voice of Customer (VoC) program vigorously measures advisor experience and satisfaction 24/7. Currently, it's ranked 4.8 out of 5 stars.

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"Cetera Financial Group" refers to the network of independent retail firms encompassing, among others, Cetera Investment Advisers LLC, a registered investment adviser, and the following FINRA/SIPC members: Cetera Advisors LLC, Cetera Advisor Networks LLC, Cetera Investment Services LLC (marketed as Cetera Financial Institutions or Cetera Investors), and Cetera Financial Specialists LLC. Located at: 655 W. Broadway, 11th Floor, San Diego, CA 92101.

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