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Cetera Announces Partnership with Citadel Credit Union

Philadelphia-area credit union serving more than 260,000 members with more than \$6 billion in assets joins Cetera Financial Institutions from CUSO Financial Services

Partnership designed to accelerate growth of Citadel Credit Union's established investment services program

SAN DIEGO – December 13, 2024 – [Cetera Financial Group](#), the premier financial advisor Wealth Hub, announced today that Citadel Credit Union has entered into a networking agreement with Cetera Financial Institutions to support and grow its investment services program. Serving more than 260,000 members with more than \$6 billion in total assets as of June 30, 2024, Citadel Credit Union is one of the largest locally owned financial institutions in the Greater Philadelphia area. Citadel Credit Union was previously affiliated with CUSO Financial Services.

"This partnership marks an exciting milestone for Citadel as we take our program to the next level with expanded solutions and services and enhanced technology to better serve our members," said Sheri Perkins, Senior Vice President and Head of Wealth Management & Retirement at Citadel. "We spent considerable time researching and evaluating broker-dealers to ensure we partnered with the best. Cetera's unmatched expertise in bank-based programs stood out as the ideal fit for our growth strategy and ability to provide a comprehensive approach to financial wellness across retail bank and wealth services. Together, we are better positioned to serve our members and advisors in meaningful ways."

"At Cetera, we pride ourselves on being the premier partner for financial institutions looking to elevate their wealth management offerings," said LeAnn Rummel, President and CEO of Cetera Investment Services. "Our extensive experience in supporting credit unions uniquely positions us to deliver tailored solutions that empower advisors and members alike. We are excited to collaborate with Citadel as they build upon their strong foundation and bring enhanced financial opportunities to their community."

"This partnership is another proof point of our mission to provide exceptional support for our members and also for the Citadel team of advisors serving members," Bill Brown, President & CEO of Citadel added. "Our wealth management platform is a key pillar in our future growth plans and our advisors are a critical part of Citadel's success. By delivering high-value products, innovative tools and expert guidance, we care for and empower all those we serve to achieve financial strength. With Cetera's robust platform and resources, they will be equipped to deliver even greater value to our members."

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 70 renewals signed through October 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 \$545 billion in assets under administration and \$235 billion in assets under management, as of September 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.

Investments are: **Not FDIC/NCUSIF insured | May lose value | Not financial institution guaranteed| Not a deposit | Not insured by any federal government agency**

About Citadel Credit Union

Citadel Credit Union is a not-for-profit, member-owned financial institution that provides banking, investments, and insurance services to more than 260,000 members. At \$6 billion in assets, it is one of the Greater Philadelphia area's largest credit unions, proudly serving residents of Bucks, Chester, Delaware, Lancaster, Montgomery, and Philadelphia counties. Citadel is recognized as a Newsweek and Plant-A Insights Group 2024 America's Best Regional Banks and Credit Unions, 2023 Fortune Recommends Best Credit Union, Forbes 2022 Best-in-State Credit Union, and a certified 2024 Great Place to Work. For more information, visit CitadelBanking.com.