**NEWS RELEASE**

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**Final – For Immediate Release**

**Coastal Wealth Management Advisors Earn Awards for Outstanding Performance**

**RALEIGH, N.C. (February 6, 2025) –** [Coastal Wealth Management](https://www.coastal24.com/Bank/Save/Retirement-Planning), available through CFS\*, is the recipient of five Pacesetter Awards, presented by CUSO Financial Services, L.P. This is the 11th consecutive year that Coastal Wealth Management has earned recognition, and the first time it has earned five awards.

CFS\* financial advisors Catherine Bryant and Jonah Kaufman earned gold level Pacesetter awards for meeting 2024 production goals and providing outstanding client service. Additionally, advisors Sam Bogaczyk, David Burk, and Rick Lowe were recognized with silver level Pacesetter awards.

“We’re proud of our team and their dedication and support of Coastal’s members,” said Ewelina Caplap, program manager. “The financial landscape is complex, and each client has unique goals and needs. Arriving at comprehensive solutions tailored to those needs helps our team to stand out year after year.”

Coastal’s program is also a top 10 Gold Pacesetter Program. Coastal Wealth Management now manages over $895 million in members’ investible assets with CFS and Members Trust Company.

**About Coastal Credit Union**

Coastal Credit Union is a not-for-profit, member-owned, financial cooperative, offering a full range of financial products and services. Coastal was chartered on August 31, 1967, with the mission of fostering the credit union philosophy of “people helping people.”  Today, with $5.51 billion in assets, Coastal serves 337,000 members from 1,800 business partners and is among the leading financial institutions in North Carolina. Coastal operates 23 locations in central North Carolina and serves members in all 50 states through a network of 5,600 shared branches, 30,000 surcharge-free ATMs, mobile banking featuring mobile check deposit, and a robust offering of online services at [www.COASTAL24.com](http://www.coastal24.com/). For more Coastal news, visit our [online newsroom](https://www.coastal24.com/about/about-coastal/pressroom).

\*Non-deposit investment products and services are offered through CUSO Financial Services, L.P. (“CFS”), a registered broker-dealer (Member [FINRA](http://www.finra.org/) / [SIPC](http://www.sipc.org/)) and SEC Registered Investment Advisor. Products offered through CFS: **are not NCUA/NCUSIF or otherwise federally insured, are not guarantees or obligations of the credit union, and may involve investment risk including possible loss of principal.** Investment Representatives are registered through CFS. Coastal Credit Union has contracted with CFS to make non-deposit investment products and services available to credit union members.

Trust services available through MEMBERS Trust Company. CFS and Coastal Credit Union are not affiliated with Members Trust Company.

**About Pacesetter Awards**

Pacesetter awards recognize the top revenue producing advisors among hundreds of credit union and bank programs. Pacesetter qualification is dependent on gross dealer concessions (GDC) generated from previous calendar year and is awarded after December 31st of each year. Pacesetter membership is no guarantee of future investment success and does not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

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