



FOR IMMEDIATE RELEASE

CUSO Financial Services L.P. Introduces Marketing Awareness Center to Provide Life Stage Workshops for Its Credit Union Investment Programs

Marketing and workshop materials help investment advisors educate clients

SAN DIEGO – June 10, 2009 – [CUSO Financial Services, L.P.](#), (CFS) a full-service broker dealer and Registered Investment Adviser that provides customized investment and insurance solutions to the [credit union industry](#), today announced the successful launch of personalized workshops helping to educate credit union members in financial awareness and planning across various life stages.

The interactive workshops address [the needs of investors](#) across multiple life stages: from getting started in investing, to rebuilding and growing retirement assets, transferring wealth and assessing income needs in retirement. The CFS program development team tailors workshops, promotional marketing materials and training for the advisors based on each credit union's demographic profile. CFS provides these compliance-approved materials free of charge, on a self-serve basis via the CFS Intranet, to investment advisors registered through the broker dealer.

“Now more than ever, credit unions have an opportunity to grow their investment programs because of the trust and rapport they have already developed with members,” said Deanne Laurvick, program development manager at CFS. “By offering these ‘town-hall-style’ investment workshops we can help credit union members to understand better the types of investing they might need to be doing at various ages and life stages, increase their own confidence and help them to feel more positive about their investment future, and ultimately, retirement options. An educated member is a loyal member.”

Several CFS-managed programs have already started offering the workshops, including Fort Campbell Federal Credit Union, University of Kentucky Federal Credit Union, CORE Credit Union and GeoVista Credit Union. [Steve Seals](#), investment advisor from the [University of Kentucky FCU](#), has said the program support resulted in

“just unbelievable response, with more than two-thirds of the attendees making follow up appointments to speak privately with investment advisors.”

Innovative thinking and definitive action like this has helped CFS to become a leader in investment and insurance services for credit unions and their members. The company was recently honored by NACUSO at its annual meeting with an honorable mention award in the 2009 NACUSO Collaboration and Innovation Award program. The purpose of the awards is to recognize national credit union service organizations that demonstrate collaboration and innovation to help create a strong and vibrant credit union industry.

About CUSO Financial Services, L.P.

Established in 1997, CUSO Financial Services, L.P. (Member FINRA/SIPC) is headquartered in San Diego and has more than 120 credit union users, including 25 of the top 100 credit unions in the country. With branch offices located nationwide, and more than 350 licensed representatives, CFS is a full-service broker dealer and Registered Investment Advisor offering customized investment and insurance solutions to credit unions. For more information, call 858-530-4400 or visit www.cusonet.com. Similar services are provided to community banks through a sister broker dealer, Sorrento Pacific Financial LLC (Member FINRA/SIPC); visit www.mybd.com for more information.

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