



**For Immediate Release**

**CUSO Financial Services, L.P. Awards Top Credit Union Investment Advisors for Record Months Despite Troubled Economy**

**Increased marketing and educational support boost performance for broker dealer, advisors and credit union partners**

**SAN DIEGO – Sept. 1, 2009** – [CUSO Financial Services \(CFS\), L.P.](#), a full-service broker dealer and Registered Investment Advisor that provides customized investment and insurance solutions to the [credit union industry](#), recognized its top investment advisors and programs for their sterling successes in 2008 at the CFS Annual User Conference and awards luncheon at the Manchester Grand Hyatt in San Diego. Despite the economic difficulties in the past year, these “pacesetters,” as they are referred to by CFS, managed to produce top results and many record-breaking months.

According to the company, with so much disruption in the financial industry and many large firms with tarnished reputations, investor clients have taken a “flight to quality,” foregoing brand names for advisors they trust. Stability and education have become increasingly important to investors. CFS responded to this situation with increased online marketing support for advisors and new educational workshops for investors.

As a result, more than 35 CFS-affiliated investment advisors had their best months ever, and the top rep did nearly \$300,000 in GDC (gross dealer concession) in one month, which is one of the top five highest single month earnings in CFS history. CFS recognized a total of 71 representatives at its user conference with Gold, Silver and Bronze Pacesetters awards, indicating they had met CFS’s highest production standards. The company awarded 23 Bronze Pacesetter awards to advisors who generated between \$350,000 and \$450,000 in Pacesetter production last year. There were 21 Silver Pacesetter award winners for advisors who generated between \$450,000 and \$575,000 in Pacesetter production. Lastly, 27 of the company’s top Pacesetters achieved Gold status, generating more than \$575,000 in Pacesetter production. The rep with the highest production credits was Kevin McDermott from Citadel Credit Union in Pennsylvania, who earned approximately \$1.5 million in Pacesetter credits. “Top Rep of the Year” was awarded to Brad Sova of DFCU Financial Credit Union in Dearborn, Michigan.

“Our advisors have weathered a ‘perfect storm’ in terms of the markets and the world economy,” said Valorie Seyfert, president and CEO of CUSO Financial Services. “Their commitment to professionalism through this challenging environment has earned them respect as seasoned advisors, resulting in the business success they deserve. CFS partners with every one of our credit unions to provide the best technology, capabilities and support we can, so we’re just as excited about their successes as they are.”

CFS has a longstanding reputation for [investment program support](#), particularly in the [technology](#) arena where the company's proprietary web-based data management system, dataVISION® is considered by many as one of the best in the industry. Two new online tools were added or enhanced this year to better support advisors, the Marketing Awareness Center with personalized workshops tailored to member life stages, and the Marketing Exchange with customizable marketing campaign templates. These tools help advisors tailor their promotional and educational materials to suit their member demographics while also increasing their own efficiency and decreasing costs.

"We're proud that many of them went the extra mile and took advantage of our support tools to better serve their clients. They serve as testament that our expanded support had a positive impact for investment programs, advisors and members. It's rewarding to know our programs help advisors and investors succeed, and we plan to continue our efforts," said Seyfert.

### **About CUSO Financial Services, LP**

Established in 1997, CUSO Financial Services, LP (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](http://www.cusonet.com). Similar services are provided to community banks and the independent channel through a sister broker dealer, Sorrento Pacific Financial LLC (Member FINRA/SIPC) and its Partnervest division: [www.sorrentopacific.com](http://www.sorrentopacific.com) .