



Member FINRA/SIPC

FOR IMMEDIATE RELEASE

San Francisco Fire Credit Union Relaunches Its Investment Program with CUSO Financial Services L.P. as its Broker Dealer

CFS chosen for leadership and guidance expertise

SAN DIEGO – Nov. 11, 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](#), has entered into an agreement to provide broker/dealer services and back office support to San Francisco Fire Credit Union (SF Fire CU,) offering investment services in San Francisco, Marin and San Mateo counties, in addition to the California State Firefighters Association.

SF Fire CU switched its broker dealer from CUNA Mutual to CFS after conducting a thorough review of three top broker dealers. The \$632 million credit union, with more than 24,800 members, has had an investment program since 2000 but was looking for better guidance and leadership support to grow the program. They found it in CUSO Financial Services, according to Darren Herrmann, senior vice president of member experience, citing marketing programs, workshop support, [technology](#) and program development support.

“CFS’s management team just gets it; they understand how credit unions like to work,” says Herrmann. “Our credit union believes that all of our members deserve the same high level of service no matter how much money they have to invest, and we found that CFS has the same [attitude about its customers](#) and their members. In addition, they were the only broker dealer capable of seamlessly integrating our online banking capabilities with a single sign-on view to the member’s individual investments. We really liked that because we have many remote users.”

CFS is providing compliance oversight and operations administration, trading services, program management and dataVISION, a proprietary Web-based, online support platform for advisors that CFS developed.

San Francisco Fire Credit Union has been proudly serving the firefighting community since 1951. The credit union has come a long way from its humble beginnings when it operated out of the San Francisco Fire Department's "Engine 17" to become the premier financial institution for firefighters and those who support them in Northern California. San Francisco Fire CU has experienced significant and sustained growth over the past four years, which it attributes to providing its membership with outstanding value, consistently ranking near or at the top of Callahan & Associates "Return to Member" rankings, and to an emphasis on delivering an exceptional service experience.

Credit unions interested in [learning more](#) about CFS programs can call 1-800-686-4724.

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. 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.

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