 

FOR IMMEDIATE RELEASE

**CFS and SPF Announce Live, Educational Webinar for Banks and Credit Unions on How to Tier Service Levels for Investment Programs to Address Client Needs**

*CUSO Financial Services and Sorrento Pacific Financial partner with business intelligence firm for important information bank and credit union executives need to know to grow investment programs*

**SAN DIEGO** – November 1, 2018 – Broker-dealers [CUSO Financial Services, L.P.](https://cusonet.com) (CFS) and [Sorrento Pacific Financial, LLC](https://cusonet.com) (SPF), partnering with Scott Stathis of executive resources and business intelligence firm [Stathis Partners](http://www.stathispartners.com/), are offering a free webinar for bank and credit union executives on [**Tiering Delivery and Service Levels to Meet Market Needs**](https://cusonet.com/tiering-delivery-webinar-2/) on Thursday, November 15, 2018 at 11 a.m. PST.

Financial institution executives who want to grow investment programs and non-deposit revenues will find this webinar extremely valuable. In particular, it will address specific strategies financial institutions can implement to move from one-size-fits-all service models to more customized investment program offerings that allow advisors to serve clients better and more efficiently.

“The financial services industry is at an inflection point,” said Stathis. “Fiduciary pressure is increasing, margin compression is dramatic, advice is being commoditized and automated. Executives at banks and credit unions are facing the biggest challenges of their careers, and they need to reengineer delivery models to avoid obsolescence. Where before community banks and credit unions may have targeted a smaller portion of consumer investment needs, today, the most successful institutions are focusing on tiered options to more effectively compete.”

In the webinar, which is sponsored by CFS/SPF, bank and credit union executive management, program managers, and other attendees will learn how to:

* Rethink traditional investment program business models to better understand the range of services that needs to be offered to address customer segments
* Offer a better experience by refocusing on relationships and advice over simply performing transactions
* Understand the spectrum of client types and their corresponding needs
* Better leverage existing human and technological resources to address more clients, including high-net-worth individuals
* Overcome margin compression and create recession-proof investment programs even as branch traffic decreases and is replaced by digital traffic

Stathis will share proven models for establishing tiered, customized service levels to address financial needs of investors from low-net-worth, to mid-market, to emerging affluent, to high-net-worth. Research from the firm shows that as investment programs move away from two or less advisor tiers serving all clients to multi-tiered models, the institution can better serve specific investor needs and life stages, increasing total productivity and recurring revenue by up to 50 percent.

“At CFS/SPF, we have known for years that one size of service does not fit all for every financial institution or its customers,” said [Valorie Seyfert](https://cusonet.com/about-cfsspf/management-team/), president and CEO of CFS/SPF. “We pride ourselves on giving credit unions and banks the tools they need to not only offer investment services but to provide them across a variety of delivery channels and service levels to best meet the needs of both the institution and their clients. Some of our programs are already using this new, tiered model and seeing success, and we want to expand that to more banks and credit unions. Research from firms like Stathis Partners demonstrates the need and effectiveness of tiered delivery and service models, so we believe it’s imperative to provide our financial institutions with training, technology, and tools they need for success in the future.”

Interested credit union and bank employees should [**register online here for the webinar**.](https://cusonet.com/tiering-delivery-webinar-2/)

**About CUSO Financial Services, LP and Sorrento Pacific Financial LLC**

CUSO Financial Services, L.P. and Sorrento Pacific Financial, LLC (Members [FINRA](http://www.finra.org)/[SIPC](http://www.sipc.org)) are subsidiaries of Atria Wealth Solutions. Established in 1997, they specialize in placing investment programs inside credit unions and banks, providing customized investment and insurance solutions to over 220 financial institutions throughout the country, with $30+ billion in AUA. Headquartered in San Diego, with branch offices nationwide, both broker-dealers are [SEC Registered Investment Advisers](http://www.sec.gov/divisions/investment/iaregulation/memoia.htm), with expertise in key areas including retirement services, wealth management, advisory solutions and insurance products for individuals and business customers. For more information, see [www.cusonet.com](http://www.cusonet.com) or visit their LinkedIn pages: [CFS](https://www.linkedin.com/company/cuso-financial-services-lp?trk=top_nav_home) and [SPF](https://www.linkedin.com/company/sorrento-pacific-financial-llc?trk=top_nav_home).

**About Stathis Partners, LLC**

Stathis Partners, LLC. is an executive resources firm in the bank and credit union brokerage channel. SP’s primary objective is to make the channel more competitive by fostering best-practices knowledge exchange and spearheading new business intelligence initiatives. This is accomplished by providing research, consulting, and live forums where executive leaders in the channel enhance strategic thinking via peer group discussions. Much of SP’s work is accomplished via partnerships with other subject matter experts in the industry. This enables us to bring best-of-breed solutions to bear. For more information on Stathis Partners, visit [www.stathispartners.com](http://www.stathispartners.com).

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