



FOR IMMEDIATE RELEASE

**CUSO Financial Services L. P. Selects Albridge Solutions to Expand Enterprise Data Management and Wealth Reporting Services**

*New Service to Include Six Months of Reporting Free-of-Charge for Advisors*

**San Diego – Mar. 30, 2011** – [CUSO Financial Services, L.P.](#), (CFS) a full-service broker-dealer and SEC Registered Investment Adviser that provides customized investment and insurance solutions to the [credit union industry](#), has selected [Albridge Solutions, Inc.](#), an affiliate of Pershing LLC, a BNY Mellon company, to provide enhanced [data management and wealth reporting solutions](#) to advisors within the CFS network. CFS will offer six months of the service to advisors free-of-charge, to give them time to become familiar with its capabilities.

Albridge's technology consolidates client account data from hundreds of disparate sources – proprietary, banking, brokerage, insurance, retirement, alternatives, trusts, and others – to provide advisors with an accurate and more complete view of their clients' holdings. By integrating these solutions with its own proprietary account management platform dataVISION®, CFS will [enhance efficiencies](#) for its advisors.

Two versions of the easy-to-use service will be offered to advisors. Each version will include the comprehensive “Portfolio Snapshot” report – a tool that represents a combination of the most frequently used reports generated for a specific time period selected by the advisor. The “Portfolio Snapshot” report includes:

- A Portfolio Summary
- Portfolio Performance by Account
- Portfolio Value and Benchmark Information

- Asset Allocation graphs depicting portfolio holdings for both Asset Allocation by Investment Objective and Asset Allocation by Asset Type

Other advisor and client-facing reports and tools offered include compliance reports, navigational tools, data entry tools, portfolio holdings, investor transactions and a centralized control center.

[Valorie Seyfert](#), president and CEO of CFS, says, “As we have since our founding, CFS embraces [advanced technologies](#) that further upgrade the service we can offer our financial institution customers. We focus on advancements that increase efficiency, enhance trust and meet compliance guidelines to make our advisors’ jobs easier and more productive. Albridge provides us with another tool to do that.”

In January 2011, [Financial Planning](#) ranked Albridge “number one” in portfolio management, in its fourth annual survey of readers, the *2010 Technology Survey*. To learn more about Albridge Solutions, please visit [www.albridge.com](http://www.albridge.com).

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

#### **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 130 credit union users, including 26 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 SEC Registered Investment Adviser 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).

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