



FOR IMMEDIATE RELEASE

Sb1 Financial Services Investment Program Recognized as Top Performer

Philadelphia, PA – October 15, 2015 – Sb1 announced that its investment services group with representatives registered through broker-dealer and SEC Registered Investment Adviser [CUSO Financial Services, LP](#) (CFS), received a 2014 Keystone Award at the CFS “*Lead Forward!*” 2015 Annual Conference, recently held in San Diego, California.

Sb1 earned the Silver Keystone award for second highest overall annual production amongst CFS financial institutions in the medium-sized category. CFS works with 245 financial institutions across the country.

The team at Sb1 has provided investment and insurance services to the credit union’s member base in PA, DE, and NJ for 12 years. Available offerings through CFS include retirement planning, wealth management, estate planning, business services, college savings, 401(k) and 457 rollovers, insurance, and more. “Ours is a competitive market, and being able to provide award-winning investment services to our clients is a differentiator that helps set us apart,” said Rob Werner, Sb1’s CEO/President “This award is testament to our team’s continual high-caliber professionalism and member service.”

The annual awards are presented by CFS as a way to recognize outstanding investment and insurance programs for their production, dedication to high standards, commitment to superior service and outstanding performance that helps each organization meet and exceed its goals. Sb1 Financial Services wins for significant revenue production in service to its investment clients.

Non-deposit investment products and services are offered through CUSO Financial Services, L.P. (“CFS”), registered broker-dealers (Members FINRA www.finra.org /SIPC www.sipc.org) and SEC Registered Investment Advisors. Products offered through CFS: are not federally insured, are not guarantees or obligations of credit unions or banks, and may involve investment risk including possible loss of principal. Credit unions and banks contract with CFS to make non-deposit investment products and services available to credit union members or bank clients.

About Sb1

Sb1 has over \$600 million in assets. Originally founded in 1977 by the employees of the SmithKline Corporation, Sb1 has over \$600-million in total member assets. Sb1 has evolved into a full-service, member-oriented financial institution servicing over 100 companies across the country, including anyone who lives, works, worships or attends school in select Philadelphia zip codes. Sb1 offers members a great option, whether they are looking for higher rates, fewer fees, or a safer place to keep their money. For more information visit sb1fcu.org

About CUSO Financial Services LLC

Full-service, sister broker dealers CUSO Financial Services, L.P. (CFS) (Members [FINRA/SIPC](http://www.finra.org)) provide customized investment and insurance solutions to financial institutions throughout the country. Headquartered in San Diego, with branch offices and licensed representatives nationwide, both broker dealers are [SEC Registered Investment Advisers](#), with expertise in key areas including retirement services, wealth management, and fee-based and insurance products for both individuals and business customers. For more information, see www.cusonet.com.

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