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As nationwide broker-dealers and Registered Investment Advisers that have always specialized in working with financial institutions, we understand your needs and that of your clients.

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Our growing teams of financial advisors offer flexible, collaborative and responsive support to meet clients' financial planning needs.



"In an industry that is continually changing, CFS/SPF equip us with the latest tools and technologies we need in order to stay ahead of industry trends and better serve our customers.

JOHN MARX,

CUSO FINANCIAL/SORRENTO PACIFIC

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