



The Investment Program at Bellco Celebrates \$1 Billion Milestone

GREENWOOD VILLAGE, CO – CUSO Financial Services (CFS)* at Bellco Credit Union is celebrating having surpassed \$1 Billion in assets under administration (AUA) at the end of 2020. The milestone was reached by 13 registered financial professionals who serve Bellco’s 26 branches in the state of Colorado.

Bellco serves the Denver front range and Grand Junction, providing a full range of products and services to members through CUSO Financial Services (CFS), a broker-dealer specializing in serving credit unions.

Cynthia Pollard, CFS* Program Manager and Executive Vice President for investment program management at Gateway Services Group (GSG), has overseen CFS’s investment program at Bellco since 2003. She said this achievement was made possible by the support of executive leadership and their experienced staff of advisors.

“On average, our CFS* financial professionals have more than seven years of experience, so they’re well equipped with the knowledge, willingness, and professional designations to engage with clients,” Pollard said. “They stay with Bellco because of the support they receive from leadership at GSG and CFS.”

CFS offers the full gamut of investment services, including advisory services, brokerage services, financial planning and more. Bellco was welcomed into the Hall of Fame at CFS in 2019 for remaining one of the broker-dealer’s top five investment programs over the past 10 years. What’s more, six of their financial professionals achieved CFS’s distinguished Pacesetter awards for 2020. In 2021, Bellco is celebrating a 20 year professional working relationship with CFS.

“We congratulate the CFS investment program at Bellco Credit Union on their accomplishment and are proud of the continued outstanding service they have provided to our members over the years,” said Doug Ferraro, CEO of Bellco. “We honor their hard work and commitment to their clients. Their knowledge,



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experience and dedication to quality customer service are an inspiration to all of us who strive for excellence in our profession.”

Scott Jentz, President of GSG, offering Program Management for CFS’s investment program at Bellco, said, “Our leadership team has achieved success by expanding the field of financial professionals, increasing educational outreach, all while providing outstanding service to our clients.”

About Bellco Credit Union

Bellco is one of Colorado’s largest financial institutions, with more than \$5 billion in assets and 26 branches in Colorado. Founded in 1936, Bellco offers a full range of financial products and services including home equity, personal and auto loans, as well as checking and savings accounts. Today, Bellco has more than 350,000 members who benefit from the advantages of a credit union, including lower interest rates on loans, higher yields on savings, and access to tens of thousands of ATMs nationwide. Connect with Bellco on Facebook and Twitter. Bellco is Federally Insured by NCUA and is an Equal Housing Opportunity Lender.

About Gateway Services Group

Gateway Services Group (GSG) is a credit union-owned company providing program management and advisory expertise for insurance, investments, trust services, and loan participation services for credit unions across the U.S. GSG delivers the personalized service to achieve our credit union client’s goals using established partnerships with significant providers in the marketplace. Visit www.gsgllc.com to learn more.

*Non-deposit investment products and services are offered through CUSO Financial Services, L.P. (“CFS”), a registered broker-dealer (Member FINRA/SIPC) and SEC Registered Investment Advisor. Products offered through CFS: **are not NCUA/NCUSIF or otherwise federally insured, are not guarantees or obligations of the credit union, and may involve investment risk including possible loss of principal.** Investment Representatives are registered through CFS. Bellco Credit Union has contracted with CFS to make non-deposit investment products and services available to credit union members.

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