



For Immediate Release

Date: November 20, 2020

Priority Financial Group (PFG)

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Oregon Community Credit Union and USE Credit Union Join Priority Financial Group's (PFG) Industry-leading RIA and Wealth Management Program

Phoenix, AZ, November 20, 2020 / -- Priority Financial Group, a leading hybrid RIA and OSJ, welcomed Oregon Community Credit Union (OCCU) and USE Credit Union (USECU) to its industry-leading wealth management program during the third quarter of 2020.

OCCU, headquartered in Eugene, Oregon, has more than \$2.3 billion in assets and offers its 180,000 members banking, lending, and wealth management services. OCCU's membership is served online and through 10 branches in Eugene, Springfield, Salem, and Wilsonville.

Ron Neumann has been part of OCCU's executive leadership team since 2010, serving first as Chief Financial Officer and later as Executive Vice President before being appointed President & CEO in 2018.

Neumann said, "We are pleased to support our members as they progress through their financial journey by offering high-quality, objective financial advice and planning services. We are excited to start this new chapter and believe that, together with PFG, we are well positioned to further develop OCCU's investment services offering, allowing us to provide the best experience possible for our members."

USE Credit Union, with more than \$1 billion in assets, serves approximately 62,000 California University employees, students, and other California residents. Founded in 1936 and headquartered in San Diego, USE membership also includes employees of California state agencies including the California Department of Motor Vehicles, California Highway Patrol, CalPERS and CalTrans, and others who live, work or worship in Alameda County, Sacramento County, San Diego County, Santa Clara County and Yolo County.

Through its new relationship with Priority Financial Group, USECU recently enhanced and relaunched its investment services program. USECU was particularly impressed by the superior technology offerings, said CFO Todd Tharp.

Tharp said, “At USECU, being able to offer our members exceptional financial planning and investment services fits seamlessly within our broader mission of helping them map a path to their dreams. We’re thrilled that our partnership with Priority Financial Group will better enable us to empower our members with industry-leading technology, support and services that can help them work toward the future of their dreams.”

Priority Financial Group CEO Mike Prior said, “The future of banking and financial planning is evolving rapidly, and the way members engage with credit unions has shifted to the mobile apps, online banking portals, and virtual engagements. We are excited to help visionary leaders such as Ron and Todd increase member loyalty and gain new sources of income through our Credit Union friendly RIA. The members benefit by having access to our low-cost, multi-custodial platform with familiar brands like Charles Schwab and Fidelity. Regardless of age or account size, the integrated and innovative fintech solutions help members better manage their 401(k)s and 403(b)s online and in the branch.

About OCCU

OCCU was founded in 1956 in Eugene, Oregon. Today, as a not-for-profit financial cooperative, OCCU has more than \$2.3 billion in assets, and its members are served through digital channels and 10 branch and service center locations in Eugene, Springfield, Salem and Wilsonville. Although most members reside in one of the 28 Oregon counties or six Washington counties OCCU serves, others reside throughout the United States and even abroad, keeping their membership active through online and mobile banking. Learn more at MyOCCU.org.

About USECU

USECU was founded in 1936 in San Diego, CA and served the financial needs of San Diego’s Division of Highways employees and was previously named “California State Employees Credit Union #17”. In 1971, they changed their name to USECU, reflecting their greatly expanded field of membership. Today, USECU has more than \$1 billion in assets and provides a broad array of financial products and services to more than 60,000 members throughout California. They operate eight physical branches throughout California and are a proud leader in financial technology, making it easy to bank with us wherever and whenever you want. In fact, USECU pioneered now-mainstream technologies including Online Banking, Mobile Banking and mobile deposit. Learn more at www.usecu.org.

About PFG

The PFG team has been providing customized compliance and practice management solutions for credit unions and financial advisors for over 30 years. PFG strives to be the #1 RIA for Credit Unions in the U.S. and an elite provider of RIA, OSJ, and Wealth Management services by offering more flexibility, choice, and value for financial institutions and advisors. PFG Advisors (PFGA) is PFG’s hybrid RIA, and Credit Union Financial Network (CUFN) is a collaboratively owned financial education and asset protection firm. The PFG team is based out of Phoenix, Arizona with Advisors located throughout the U.S. in seven states. For more information, visit www.pfgteam.com