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CAPSTONE
STRATEGIC

NEWS RELEASE

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CrossState Solutions Partners with Capstone Strategic

Harrisburg, PA – CrossState Solutions is proud to announce a new partnership with [Capstone Strategic](#), a consulting firm specializing in credit union service organization (CUSO) transactions and acquisition advisory services.

Through this partnership, CrossState’s member credit unions will gain access to Capstone Strategic’s expertise in acquisition planning and execution, market and company analysis, valuation, and advisory services. For more than two decades, Capstone has been guiding institutions through the evaluation of external growth opportunities, strengthening long-term strategy, and navigating complex transactions with confidence.

“Capstone Strategic is a trusted leader in helping organizations pursue thoughtful, well-executed growth strategies,” said Monika Edlis, Director of Solutions Engagement at CrossState Solutions. “We are excited to connect our credit unions with a partner that brings deep acquisition and CUSO expertise and a disciplined, strategic approach to evaluating opportunities that support sustainable growth.”

“We’re excited to bring Capstone’s deep experience in advising credit unions and CUSOs to credit unions benefitting from the CrossState Solutions’ community,” said Capstone Partner John Dearing. “As the CUSO deal leader, credit unions will benefit from our experience, coupled with the usage of proven processes and tools to increase their likelihood of success. We look forward to working closely with leaders of all sizes of credit unions to craft CUSO strategies that align with their vision, values, and long-term growth goals.”

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About CrossState Solutions

[CrossState Solutions](#), a wholly owned subsidiary of CrossState Credit Union Association, delivers practical, high-impact solutions to help credit unions operate efficiently, grow strategically, and thrive. Committed to advancing credit unions in New Jersey, Pennsylvania, and beyond, CrossState Solutions provides innovative products and services that drive long-term success.

About Capstone Strategic Inc

Capstone is the leader in strategic acquisitions for credit union service organizations (CUSOs) and helps credit union leaders expand proactively through acquisition advisory services. Founded in 1995, their team brings a unique perspective having worked with credit unions and CUSOs as well as for-profit businesses in over 120 unique markets.

The Roadmap to Acquisitions, their systematic methodology for helping clients grow, has been proven through successful transactions over three decades, primarily through the acquisition of privately held, not for sale entities. They have leveraged their expertise to help credit unions, fintechs, CUSO leaders, and board members with strategic acquisitions, valuation expertise, deal advisory services and through the evaluation of markets and prospects while prioritizing growth initiatives. No other advisory firm combines their staged approach to external growth, and no other provider offers their unique blend of strategic consulting and hands-on deal management. Capstone is the CUSO transaction leader.

For more information, contact John Dearing at jdearing@CapstoneStrategic.com, call 703-854-1910, visit www.capstonestrategic.com, or visit <https://www.crossstate.org/solutions/solutions-directory/partner/capstonestrategicinc>