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CFS and SPF Annual Conference Showcases Technology, Investment Business Strategies, and More to Meet Demands of the Future

New hands-on technology workshops, “Tech Hub” with new product demos, keynote speakers, and 70 sessions address how to thrive in the wealth management industry of the future

SAN DIEGO – Aug 1, 2018 – Broker dealers [CUSO Financial Services, L.P.](#) (CFS) and [Sorrento Pacific Financial, LLC](#) (SPF) will hold their [2018 CFS/SPF Annual Conference](#) August 6 – 9, 2018 at the Manchester Grand Hyatt San Diego. The conference provides financial institution executives, program managers, financial advisors and other attendees the opportunity to learn about the latest strategies, trends, technologies, and solutions impacting the wealth management industry and to gain knowledge and skills to successfully grow investment programs within regional banks and credit unions.

The four-day event includes industry expert keynote speakers, pre-conference educational boot camp, technology workshops, tech hub and lab, nearly 70 breakout sessions, more than 10 hours of networking, and more than 50 exhibitors providing the latest products and services to help attendees improve their practices. The conference theme, “Fulfilling the Vision,” symbolizes CFS and SPF’s vision to build the industry’s premier wealth management firm and to help credit unions, banks, and advisors achieve their visions for investment programs in a quickly-evolving industry.

This will be the first CFS/SPF annual conference highlighting the enhancements and resources brought by their holding company, Atria Wealth Solutions. The combined teams will present the latest advancements in the upgraded technology platform, enhanced product solutions, and future plans.

“The wealth management industry is changing, and expectations have evolved beyond what was working just last year. We are excited to showcase the new enhancements we’ve made over the last six months working with our partners and how our latest and future plans will exceed our clients’ expectations,” said [Valorie Seyfert](#), president/CEO for CFS/SPF. “Our annual conference is an opportunity for financial professionals to improve their skillsets, investment programs, and bottom lines. It’s a comprehensive and interactive environment where attendees get the tools they need to take their investment programs to the next level. Our goal is for all attendees to return to their offices with three to five actionable takeaways that can be incorporated on Monday!”

The 2018 Keynote speakers include:

- **Michael Kitces**, partner and director of research for Pinnacle Advisory Group, will lead the pre-conference educational boot camp on Monday August 6. The presentation will focus on the future of financial planning in the digital age.
- **Josh Linkner**, chairman and co-founder of The Institute for Applied Creativity, will present “Pursuing a Vision Through Start-Up Thinking: fresh approaches to growth, change and transformation.” This presentation will help advisors think like entrepreneurs adding creativity and innovation to their business.
- **Nick Sargen**, Chief Economist and Senior Investment Advisor for Fort Washington Investment Advisors, will share the latest news on the economy, markets, and Capitol Hill, and will provide strategic insights on what to expect in the coming year.
- **Stephen Harvill**, president and CEO of Creative Ventures, will present “Maximize the Impact of the Digital Revolution: The Value of YOU!” His session will provide a simple 2-part formula for advisors to define the value they provide beyond the digital experience.

Additionally, there will be technology workshops held after the boot camp. The sessions will feature demos of key technology tools and services so attendees can feel comfortable and confident integrating them into their practices. The conference will include a new “tech lab” offering hands-on, guided instruction on digital business tools. These breakout sessions provide computers for attendees to follow along on and learn technology tips. Attendees will also have an opportunity to view various technology and product solution demonstrations and upcoming features and functionality of the newly designed platform at the “Tech Hub.” This includes upcoming enhancements to the client portal, advisor portal, communication tools and more.

An awards program is one of the highlights of the conference. Two new advisors will be inducted into the Hall of Fame, recognizing individuals that have consistently brought their passion for service to their investment programs. CFS/SPF will recognize 97 financial advisors with Pacesetter Awards, which honors those who have met top production goals and provided outstanding service to clients.

Registered attendees will have access to a mobile app to keep all conference-related info at their fingertips. They can use the app to plan which sessions to attend, connect with other attendees, stay updated on conference news and more.

Contact Steve Hollenbeck, vice president corporate events, at shollenbeck@cusonet.com for more information about the annual conference.

About CUSO Financial Services, LP and Sorrento Pacific Financial LLC

CUSO Financial Services, L.P. and Sorrento Pacific Financial, LLC (Members [FINRA/SIPC](#)) are subsidiaries of Atria Wealth Solutions. Established in 1997, they specialize in placing investment programs inside credit unions and banks, providing customized investment and insurance solutions to over 200 financial institutions throughout the country, with \$30+ billion in AUA. Headquartered in San Diego, with branch offices nationwide, both broker-dealers are [SEC Registered Investment Advisers](#), with expertise in key areas including retirement services, wealth management, advisory solutions and insurance products for individuals and business customers. For more information, see www.cusonet.com or visit their LinkedIn pages: [CFS](#) and [SPF](#).

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Media Contact:

Nikki Sachman

nikki@clearpointagency.com

760-230-2424