



FOR IMMEDIATE RELEASE

## **CUSO Financial Services CIO Honored with Top Tech Exec Award in San Diego**

**SAN DIEGO – May 23, 2017** – Sister broker-dealers [CUSO Financial Services, LP](#) (CFS) and [Sorrento Pacific Financial, LLC](#) (SPF) are celebrating the honor bestowed on their Chief Information Officer [Bob Millington](#) as Top Tech Exec in San Diego for medium-sized companies. The award was announced at an award ceremony in front of 1,200 people at Petco Park on Thursday, May 11<sup>th</sup>. Out of 600 nominations received, Millington was one of 11 people named as honorees.



Millington leads the technology planning and execution at these successful broker-dealers that implement investment programs inside financial institutions, including credit unions and regional banks. He has been with the companies for slightly more than three years, but in that time, he and his team have: developed two award-winning mobile apps; improved CFS/SPF's systems and security structures, as proven by two successful audits: the SSAE 16 for SOC Type 1 certification and the SSAE 16 SOC 1/Type II audit, both standards of the Auditing Standards Board (ASB) of the American Institute of Certified Public Accountants (AICPA); and have managed the acquisition and integration of a software development company and the complete restructuring of the IT department.

CEO Valorie Seyfert says, "We are so proud of Bob and glad that he has been honored with this award. We have always had a strong focus on leading our industry in technology that creates efficiencies and makes it easier for financial advisors and their clients to work together. Bob is a guiding light in maintaining and improving on that position. He truly deserves to be recognized for his immeasurable contributions."

Nominations for the Top Tech Exec Awards were open to all businesses and IT executives in San Diego County, with submissions delivered through the [Top Tech Exec website](#). An independent panel composed of experienced business executives and information technology professionals reviewed the nominations and selected the qualified nominees to be further evaluated by the Top Tech Exec Awards judges.

Now 20 years in business and with assets under administration (AUA) at nearly \$30 billion, CFS/SPF oversee the service and support of hundreds of investment programs at financial institutions around the country. CFS/SPF have more than 450 advisors under registration and 138 home office employees working at the headquarters in San Diego and distributed throughout the U.S. Over its 20 years, CFS has returned more than \$44 million in profits to its limited partners.

In recent years, CFS/SPF have gained an impressive list of accolades. Their technology innovations have been honored four times by the Bank Insurance & Securities Association. CEO Valorie Seyfert was recognized as the 2008 Ernst & Young Entrepreneur of the Year for Business Services in San Diego, and several CFS advisors and program managers annually rank in the top 100 identified by *Bank Investment Consultant* magazine. Bob Millington's tech award now joins the list.

### **About CUSO Financial Services, LP and Sorrento Pacific Financial LLC**

Full-service, sister broker dealers CUSO Financial Services, L.P. and Sorrento Pacific Financial LLC (Members [FINRA/SIPC](#)) provide customized investment and insurance solutions to financial institutions. With branch offices and licensed representatives nationwide, both broker dealers are [SEC Registered Investment Advisers](#), with expertise in key areas including retirement services, wealth management, and fee-based and insurance products for individuals and business customers. For more information, see [www.cusonet.com](http://www.cusonet.com) or [www.sorrentopacific.com](http://www.sorrentopacific.com) or visit their LinkedIn pages: [CFS](#) and [SPF](#).

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