



FOR IMMEDIATE RELEASE

CUSO Financial Services and Sorrento Pacific Financial Receive Fourth Tech Innovation Award at Bank Insurance & Securities Association Annual Conference

SAN DIEGO – March 14, 2017 – For the fourth year in a row, a technology innovation from sister companies [CUSO Financial Services, LP](#) (CFS) and [Sorrento Pacific Financial, LLC](#) (SPF) has been honored by The Bank Insurance & Securities Association (BISA). This year's innovation, MyPortfolioView™ (MPV) is a mobile application that provides clients an easy and secure way to manage their investment portfolios remotely.

Announced at BISA's annual conference, March 7-10, [The BISA Technology Innovation Award](#) recognizes technology invention in the advancement of financial service industry products, services and platforms. MPV allows users a full view of all of their investment account history, including account summaries, sales transactions and details behind all of their positions. The service is white-labeled by CFS and SPF, allowing the bank or credit union to use its own branding, logo and color scheme when offering the service to customers.

The MPV mobile app complements the online version of MyPortfolioView that CFS and SPF have long offered, which enables institutions to integrate investment program information into their existing websites. With the MPV mobile capability, investment clients can now access full information securely through a mobile device. The mobile app is available to users of both iOS and Android devices.

Bill Bouma, CFS investment representative at [Consumers Credit Union](#) says, "We live in an increasingly mobile world. People are used to being able to do just about any transaction through their mobile devices. Mobile investment portfolio management is the next step in the evolution of online banking. This mobile app is more visually appealing and intuitive to operate than anything I've seen before."

CFS and SPF have been honored three times previously, twice for [mobile applications](#) and once for a secure online profiling tool. All four technologies integrate seamlessly with the companies' proprietary client and account management system, dataVISION®.

CFS and SPF specialize in building investment programs inside financial institutions and have had a commitment to technology innovation from inception. As client mobility increases and traditional branch visits decrease, the companies have expanded their suite of remote delivery tools to make it easier for advisors to work with clients conveniently and efficiently through mobile and online channels.

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 throughout the country. Headquartered in San Diego, 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 both individuals and business customers. For more information, see www.cusonet.com or www.sorrentopacific.com or visit their LinkedIn pages: [CFS](#) and [SPF](#).

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