



FOR IMMEDIATE RELEASE

Sister Broker-Dealers CUSO Financial Services and Sorrento Pacific Financial Release MyPortfolioView Mobile Application for Investment Clients at Financial Institutions

Investment portfolio management and communication with financial advisors improved with user-friendly and secure mobile app

SAN DIEGO – Jan. 5, 2017 – Sister broker-dealers, [CUSO Financial Services, L.P.](#) (CFS) and [Sorrento Pacific Financial, LLC](#) (SPF), have launched a new mobile application for usage by investment clients, [MyPortfolioView™](#) (MPV), which provides a secure way for clients to work with their financial advisors on portfolio management. The mobile program is fully integrated with the companies' account management system, [dataVISION®](#), and allows users a full view of all of their investment account history, including financial plans, dividends, 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 program's goal is to offer ease-of-use to clients on a mobile and immediate basis and to improve loyalty for the financial institution with its customers, especially those technology-enabled and often younger clients who are used to being able to do everything electronically and via mobile devices. It is available for download now for iOS products, including iPhones® and iPads®, and is expected to be ready for Android® users in early 2017. Visit <http://cfsmpv.com> to download.

Advisors use dataVISION to drive content from the backend office to MPV. Bill Bouma, investment representative at [Consumers Credit Union](#) is an early tester of the mobile app. He says, "We live in an increasingly mobile world. People are used to being able to do just about any transaction, including online banking, through their mobile devices. Mobile investment portfolio management is the next step in this evolution. This mobile app is more visually appealing and intuitive to operate than anything I've seen before. Our clients are going to love it."

The program offers a view of advisor profiles as well as a holistic view of accounts by family or by individual, depending on the client's preferences. It also provides statements and historical positions held.

[Bob Millington](#), executive vice president and chief information officer for CFS and SPF, worked on the development of the program with advisors and financial institutions for many months before finally identifying all the specifications for it.

“We’re very excited to release this broadly as our feedback from initial testers has been excellent,” Millington says, and he adds, “This is just the beginning. Soon we will incorporate DocuSign digital signatures and, eventually, a Web services API that will provide full integration with a financial institution’s own mobile banking capabilities through a single sign-on. No matter what mobility the future brings, we’re ready for it!”

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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