



FOR IMMEDIATE RELEASE

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

**SAN DIEGO – March 29, 2016** – For the third 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). The companies' award-winning mobile app, SendMyDocs™, is a retail investment application that allows clients to capture document images via their iOS® or Android® device and send them securely to their investment representative for inclusion in their portfolio documentation. The award was announced at BISA's annual conference held March 15-18, 2016 in Hollywood, Florida.



[The BISA Technology Innovation Award](#) recognizes leadership in the advancement of financial service industry products, services and platforms through technology innovation. CFS and SPF have been honored twice previously, once for a similar [mobile application](#) for use by financial advisors, and once for a secure online profiling tool, [BuildMyProfile™](#). All three technologies integrate with the companies' proprietary client and account management system, dataVISION®. This allows seamless and automatic information collection throughout the system.

CFS and SPF specialize in building investment programs inside financial institutions and have had a commitment to technology innovation from inception. As clients visit traditional branches less frequently, the companies have expanded their suite of remote delivery tools to increase the ease of working remotely, making it more convenient and efficient for advisors and clients to conduct their investment business from start to finish through mobile and online channels.

“SendMyDocs™ is a tech must for me,” says Kevin Friddle, financial advisor at Alpena Alcona Area Credit Union in Michigan. “When I’m remote, I use it for new account forms, product applications, and more. I do them immediately rather than carry around a

large file of paperwork to do later. So it's more efficient, and more secure for my clients." Friddle serves seven branches and also works with his branch managers to use SendMyDocs™ for last minute client signatures when needed. "It means providing better, faster service to my remote clients. Because we're working together, it also solidifies my relationship with the branch managers."

The app meets all regulatory compliance requirements and is available for iOS users on their iPad®, iPod® and iPhone® devices and for Android devices as well.

**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](http://www.cusonet.com) or [www.sorrentopacific.com](http://www.sorrentopacific.com) or visit their LinkedIn pages: [CFS](#) and [SPF](#).

###

Contact:

Beth Walsh

[beth@clearpointagency.com](mailto:beth@clearpointagency.com)

760-230-2424