



FOR IMMEDIATE RELEASE

Sorrento Pacific Financial, LLC and CUSO Financial Services, L.P. Host Annual Conference for Investment Advisors and Programs

Keynote speaker Aron Ralston, investment experts, and top financial product vendors on hand for attendees in San Diego

SAN DIEGO – July 27, 2011 – Sister companies Sorrento Pacific Financial, LLC ([SPF](#)) and CUSO Financial Services, L.P. ([CFS](#)), two full-service broker dealers and SEC Registered Investment Advisers providing customized investment and insurance solutions to financial institutions, will hold their annual user conference, themed “[It’s a New Day 2011](#)”, from July 30th to August 3rd at the Manchester Grand Hyatt in San Diego. The conference includes award presentations to top investment advisors and programs, educational opportunities, and keynote speakers such as Aron Ralston, the mountain climber and inspiration for the film “*127 Hours*.”

Now in its thirteenth year, the user conference provides training, information on best practices and a supportive environment for people working in investment programs: executives, marketers, advisors and assistants. With three focused tracks – Executive, Marketing and Education – attendees have multiple opportunities to learn from experts during highly engaging, actionable and relevant educational workshops as well as to participate in several networking events throughout the conference.

The conference includes more than 50 unique presentations from SPF and CFS staff, outside consultants and product vendors. Subjects include product training, marketing, technology tools, regulatory reform, customer service, employee management, and many more that will help an investment advisor or investment program gain efficiencies and elevate their success.

Attendees can expect several offerings from [Albridge Solutions, Inc.](#), an affiliate of Pershing LLC, now providing enhanced data management and wealth reporting solutions to advisors within the SPF and CFS network. Albridge will present three educational sessions and will host the “Albridge Lab” for the entirety of the conference so advisors and program managers can access demonstrations and how-to’s for the client performance tool.

Awards luncheons, to be held on Monday and Tuesday, will recognize top investment advisors and programs for their achievements in 2010. Top advisors, or “Pacesetters,” as they are called by SPF and CFS, produced top results and many record-breaking months despite economic challenges. Advisors are honored with Gold, Silver and Bronze Pacesetter awards, indicating they have met the broker dealers’ highest production standards.

Leading the keynote speakers on Monday is [Aron Ralston](#), the mountain climber and inspiration for the Oscar-nominated film “*127 Hours*.” Ralston’s story made headlines worldwide, when after being pinned by a half-ton boulder for nearly a week, he narrowly escaped death by



severing his own forearm. Ralston documented the life-altering experience and his remarkable will to survive in his *New York Times* best-selling book, *Between a Rock and a Hard Place*.

Tuesday's keynote speaker is [Dr. Jeffrey Rosensweig](#), director of the Global Perspectives Program at Goizueta Business School of Emory University. An international business and finance professor, Rosensweig focuses his research, teaching, and consulting on global investing and business in the global economy.

Wednesday's keynote speaker is [Dr. Kevin Elko](#), a performance consultant, motivational speaker and author of the books *Nerves of Steel*, *The Pep Talk*, and *True Greatness: Mastering the Inner Game of Business Success*.

Rounding out the conference are several interesting events including a pre-conference "boot camp" on sales practices, an opening reception at Balboa Park's Spanish Village, several expert roundtables, and an ongoing Exhibitor Showcase for attendees to interact with product partners.

More information and conference registration is available at <http://www.cusonet.com>.

About Sorrento Pacific Financial Services, LLC

Established in 2005, [Sorrento Pacific Financial, LLC](#) (Member FINRA/SIPC) is a full-service broker dealer offering customized investment and insurance solutions, training and program development support to the banking industry and the independent channel. SPF provides expertise in key areas including retirement services, wealth management, and fee-based and insurance products for both individuals and business customers, and provides a fully-electronic account management system for advisors. www.sorrentopacific.com or call 888.805.5585

About CUSO Financial Services, L.P.

Established in 1997, CUSO Financial Services, L.P. (Member FINRA/SIPC) is headquartered in San Diego and has [more than 135 credit union](#) users, including 25 of the top 100 credit unions in the country. With branch offices located nationwide, and more than 350 licensed representatives, CFS is a full-service broker/dealer and SEC Registered Investment Adviser offering customized investment and insurance solutions to credit unions. For [more information](#), call 858-530-4400 or visit www.cusonet.com.

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