



## **FOR IMMEDIATE RELEASE**

### **Broker Dealer Sorrento Pacific Financial Integrates EISI's Profiles Forecaster Planning Software into dataVISION to Enhance Client Experience**

*Advisors use interview-style interface to assess clients' financial situation and create detailed plans in minutes*

**SAN DIEGO – December 13, 2010** – [Sorrento Pacific Financial, LLC](#), (SPF), a full-service broker dealer and Registered Investment Adviser providing customized investment, wealth management and insurance solutions to the financial industry, has integrated EISI's planning software and needs analysis tool, Profiles Forecaster, with its Web-based [data management system](#), dataVISION®, to provide more comprehensive planning services for its bank and independent investment program customers and advisors.

With this integration, advisors can import existing client portfolio information directly from dataVISION into Profiles Forecaster automatically, saving time and reducing the chance for data-entry errors. In addition, as an advisor creates or updates a financial plan through Profiles Forecaster, an electronic version of the document is saved and archived to the client record within dataVISION. This provides a historical record of the advisor's due diligence and an audit trail that minimizes risk of liability. In addition, it provides a comprehensive look at the clients' accounts.

SPF investment advisors use Profiles Forecaster to ensure client meetings are organized and thorough. It is a goal-based application, [helping clients understand](#) how their current portfolio compares to their stated goals. The advisor can present questions across a variety of modules and then use the client's answers to create a clear and logical financial plan with action-oriented recommendations to help them reach their investment goals. A professional and customized financial plan can be created in just minutes.

Available modules include: asset allocation, retirement accumulation, college planning, needs in the event of death, long-term care needs, and disability needs.

"The Profiles Forecaster integration with dataVISION is the latest [technology enhancement](#) we're providing to help our advisors be more successful," said Rick Dahl, senior vice president of SPF. "Studies show that advisors who consistently use analysis and planning tools manage more of a client's assets and have stickier client relationships. We're already seeing that with our early adopters. We encourage all SPF advisors to consider adopting this approach."

[For more information](#) or a demo of SPF's Forecaster Profiles software, call 888.805.5585, extension 7910.

## **About Sorrento Pacific Financial Services, LLC**

Established in 2005, [Sorrento Pacific Financial, LLC](http://www.sorrentopacific.com) (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. Headquartered in San Diego, SPF works with banks and independent advisors throughout the country, providing 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. For more information, call toll-free 888.805.5585, extension 7915, or visit [www.sorrentopacific.com](http://www.sorrentopacific.com).

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