

Sorrento Pacific Financial to Present Workshop on Investment Services Best Practices at 2009 ICBA National Convention

Workshop “Focus on Investment Services – Now, More Than Ever” to demonstrate how financial institutions can harness investment programs to thrive through economic challenges

SAN DIEGO and PHOENIX – March 2, 2009 – Executives from [Sorrento Pacific Financial](#), LLC, (SPF) a full-service broker dealer and Registered Investment Adviser that provides customized investment and insurance solutions to the banking industry, will present a workshop at the Independent Community Bankers of America (ICBA) [2009 National Convention and Techworld](#) conference to be held in Phoenix, Arizona on March 18-22, 2009. SPF’s workshop “Focus on Investment Services – Now, More Than Ever,” will be on Friday, March 20, from 7:30 a.m. – 8:30 a.m. and will center around the theme of Challenge Plus Change Equals Opportunity.

Steve Hollenbeck, senior vice president of marketing for SPF, will discuss the obstacles, successes and best practices associated with investment programs at top financial institutions. Attendees will learn about the strategies being used by wealth management programs to not just survive, but actually thrive, during this economic recession.

According to SPF, there is a “flight to quality” right now as consumers try to find the best institutions for their banking and investing dollars. Community banks risk losing their core deposits and customers if they don’t offer investment services; by implementing effective investment programs, they can send increased revenue straight to their bottom line.

“Many customers are dissatisfied with their advisors right now, and someone new is going to get their business,” says Hollenbeck. “At SPF, we want that someone to be you.”

This workshop will review some of the best practices developed for financial institutions by SPF. Attendees will take away tips on effectively using technology tools like SPF’s Web-based support platform [dataVISION®](#) to work with clients and maximize investment programs.

Hollenbeck adds, “SPF specializes in responsive partnership with community banks, so we’re well-versed in their challenges and needs. Our ICBA workshop will be beneficial to anyone interested in using their investment services program to increase their bottom line.”

The ICBA National Convention is the largest, most comprehensive event of its kind with more than 70 educational opportunities, 240 exhibitors and some of Washington's top policymakers. It is combined with Techworld, the largest trade show for community bankers worldwide, and attracts more than 1,000 bankers every year. [ICBA](#) is comprised of 5,000 community banks of all sizes throughout the U.S. and is dedicated to representing the interests of the community banking industry and the customers they serve.

After the workshop, executives from SPF will be available to meet with attendees and prospective customers to answer any questions. Interested parties can contact the company at 888.805.5585.

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. Headquartered in San Diego, SPF works with more than 85 community banks nationwide and holds a strategic alliance with ICBA (Independent Community Bankers of America.) SPF offers 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 or visit www.mybd.com.

###

Contact: Alexia Yates
Clearpoint Agency, Inc.
858.724.2500
alexia@clearpointagency.com