

FOR IMMEDIATE RELEASE

Sorrento Pacific Financial Introduces My Portfolio View™ to Community Banks

Home banking websites enhanced with customers' investment portfolio module

SAN DIEGO – Feb. 17, 2009 – 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, today announced it has introduced My Portfolio View (MPV), a new customer enhancement module, to its community bank customers. With MPV, banks can integrate their customers' investment information into their regular home banking Websites, branded to match the look and feel of the bank's Website.

Community banking customers will be able to see their full investment portfolio held at the bank via the same home banking website they typically use for online bill pay and account review. SPF has introduced this technology as a customer-facing component of dataVISION®, a secure, Web-based account management system that simplifies administration, communications, and reporting functions for investment advisors. MPV shows customers and advisors the same up-to-date information for investment reviews, and makes it easy for customers to know the status of their investments at any time of the day or night.

According to management and investment advisors at Farmers and Merchants Bank & Trust in Burlington, Iowa, a Sorrento Pacific customer that has already integrated the module, My Portfolio View has met banking customers' expectations and created efficiencies for financial advisors.

"In order to stay competitive with other firms, we must offer this type of access to our customers; they expect it and deserve it," says Mike Schwenker, investment program manager at Farmers and Merchants B&T. "It has reduced confusion for them and our advisors because we are reading from the same computer screen, not old statements in their hands and up-to-the-minute screens in ours, and many of their questions are answered simply by reviewing their accounts online or over the phone." Schwenker adds, "Actually, the entire dataVISION operating system is great and the support we get from SPF is outstanding."

Fully-electronic dataVISION was designed to efficiently manage the administration and organization of accounts, creating a paperless office where all information is immediate. It provides registered representatives and branch managers with remote access to a comprehensive array of functions, including an order entry platform, blotters, calendar, client history, customer account tracking information, electronic copies of customer documents and all needed reports. An online help directory and educational information make it easy to use. Rate boards and fee schedules are updated automatically, allowing advisors and management to see changes as they occur.

“Now, more than ever, community banks have an opportunity to grow their investment programs. They have already earned the trust of their customers,” says Rick Dahl, senior vice president at Sorrento Pacific Financial. “By offering these technology tools, educational training and program development support, SPF aids banks to show what they can do to help customers weather the troubled financial times we’re facing.”

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.

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