

FOR IMMEDIATE RELEASE

Sorrento Pacific Financial Adds Securant Bank & Trust as Investment Program Customer

Focus on fee-based products and community bank experience provide rationale for broker-dealer choice

SAN DIEGO – Aug. 24, 2009 – [Sorrento Pacific Financial](#), LLC, (SPF) a full-service broker dealer and Registered Investment Adviser providing customized investment and insurance solutions to the financial industry, announces [Securant Bank & Trust](#)[™] (Securant) as a new investment program customer.

Headquartered in Milwaukee, Securant is an independent bank that operates five branches in Southeastern Wisconsin and holds \$245 million in assets. Though nearly 100 years old, the bank opened its [Wealth Management Group](#) just last year, after which Mike Karbouski, CFP®, vice president and financial advisor, went to work finding a broker dealer. The bank decided on SPF after three months of extensive research into broker dealers ranging from the very small to some of the largest in the nation.

Securant executives chose SPF for several reasons:

- The broker dealer's nimble size: SPF was approachable and responsive.
- Top references: SPF was recommended by the Independent Community Bankers of America Financial Services (ICBA FS), a subsidiary of the ICBA which is an organization representing the interests of 5,000 community banks throughout the United States.
- Program support: consistent with the industry trend, Securant's Wealth Management Group has started focusing more on offering fee-based, professionally managed accounts rather than commission-based products, a strategy that SPF supports and embraces.
- Good people: executives found SPF's partnership-oriented culture and responsive people to be right in line with its own culture of success through service.

The SPF team has gotten Securant's investment program up and running quickly. By providing its proprietary Web-based support platform, [dataVISION](#)®, as well as ongoing weekly technology trainings, SPF ensured the transition was not only easy, but effective, too.

"We have already seen significant growth in our Wealth Management Group thanks to our work with SPF; we've gained over \$5 million in investment assets despite the struggling economy," says Karbouski. "We look forward to a long relationship with SPF and are confident we will see continued growth."

Securant Bank & Trust offers multiple services through the Wealth Management Division, including: investments, tax planning, education, estate and retirement planning, long-term care, life insurance and charitable giving. The bank has over 60 employees helping clients achieve their financial goals with the mission: “Your success. Our purpose.”

“Our experience in working with community bank investment programs helped us to jumpstart their investment services program,” said Rick Dahl, senior vice president of SPF. “Taking a bank from no investment program to \$5 million in assets and growing in a matter of weeks is an exciting process. With Securant, as with all clients, SPF will focus on providing responsive customer service and leading edge technology to make their team as efficient as possible. We’re looking forward to their continued success.”

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. Headquartered in San Diego, SPF works with more than 85 community banks nationwide and holds a strategic alliance with ICBA Financial Services. 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, extension 7910, or visit www.mybd.com.

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