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## **American Portfolios Financial Services Hosts 16<sup>th</sup> Annual National Conference at Mohegan Sun**

HOLBROOK, N.Y. (Nov. 3, 2017)—Independent broker/dealer American Portfolios Financial Services, Inc. (AP) recently hosted its annual national conference, Connections 2017, at Mohegan Sun in Uncasville, Conn. As a business solutions provider serving approximately 800 affiliated investment professionals throughout the United States, the three-day event, which began on Oct. 25 and concluded on Oct. 27, provided the perfect forum in which these private practitioners could come together to learn, network and exchange ideas on building their business.

“This was our best conference yet,” states President of Sales and New Business Development Tim O’Grady. “Throughout the year, we’ve been listening closely to our affiliated advisors and their support staff about what’s most important to them. We are quite pleased with the feedback we’ve received on everything from the choice of venue to the well-planned agenda, which was packed with panels and breakout sessions tailored to the specific needs of our advisor community. They’ve come away with lots of great information and tools to bring back to their practices and put into effect immediately.”

While at Connections 2017, attendees were exposed to industry-relevant thought leadership presentations, including the annual State of the Firm address from CEO Lon T. Dolber. Dolber spoke in-depth about the impact of client longevity. “With each passing generation, we see that people are living longer. In fact, Baby Boomers are projected to live well into their 90s,” Dolber stated. “But, as life longevity increases with more demands to help investing clients outlive their money, the financial services industry is facing continuous downward pricing pressures on the services it provides. To stay price competitive, as investment professionals how do we reduce expenses, but not sacrifice value-added service?” Looking to the future, CEO Lon T. Dolber explained how living all-in at 100 bps or less by creating operating leverage—not only for the broker/dealer, but also its valued customers and their practices through its philosophy of platform and technology independence—will be the key to having scalable and sustainable businesses.

Other highlights at Connections 2017 included three esteemed keynote speakers: former chairman of the Board of Governors of the Federal Reserve System, Dr. Alan Greenspan, aka “The Maestro”; motivator and mentor to advisors in the financial services industry, Don Connelly; and senior investment strategist for OppenheimerFunds, Brian Levitt. Founder and CEO Jason Roberts of Pension Resource Institute rounded out Connections’ notable guest speakers by holding several sessions that provided an overview of the state and fate of the current DOL fiduciary rule.

AP’s continued emphasis and commitment to achieve platform and technology independence was front and center at the annual conference, where the broker/dealer revealed its new and improved technology platform named HomePort. HomePort serves as the central location from which all proprietary and integrated Web services may be accessed: by



investment professionals and their staff to conduct business, including model management, commissions, compliance and practice management; by AP home office staff to help investment professionals conduct business on a daily basis; and by the clients of AP's investment professionals to provide them more convenience and transparency in accessing and reviewing their accounts. Attendees were given a live demo of HomePort, in addition to its full suite of Web-based business solutions via two AP Tech exhibits situated in the event's main thoroughfare. AP staff members were on-hand to demonstrate and answer questions on such services as its advisory technology platform, Portfolio Insight, and STARS, the firm's business processing back office solution, among many other Web-service offerings essential in the day-to-day operations of the firm's valuable advisors.

Given AP's long-standing commitment to corporate social responsibility (CSR), the firm was proud to welcome The Center for Discovery (The Center) to Connections 2017. The Center, which has been designated as a "Center of Excellence" by the state of New York, is a major research and specialty center that offers residential, medical and special education programs. For the past 10 years, teams from AP and World T.E.A.M. Sports (WTS) have partnered with The Center to provide extraordinary experiences for disabled athletes through the Adventure Team Challenge (ATC). During The Center's presentation, they unveiled indieGo. Developed in part with funding from Google.org, indieGo is an innovative power mobility device that turns any manual wheelchair into a power wheelchair, instantly. In addition to this exciting innovative announcement, The Center also formally recognized Dolber as their 2018 honoree for his unwavering dedication to CSR.

An evening was also spent celebrating AP's third consecutive win of Broker/Dealer of the Year by Investment Advisor magazine at the annual banquet awards dinner on Thursday, Oct. 26. During this event, the firm recognized its Employee of the Year, its top producers and managers, and the overall business successes of colleagues, a number of whom have been with AP since its inception in September 2001. Following the banquet, guests convened at Mohegan Sun's Cabaret Theater to watch a live performance of That Motown Band, of which Dolber is a member.

Connections 2017 also provided plenty of leisure time in which to enjoy one of New England's most exciting destinations, Mohegan Sun. Attendees spent their downtime enjoying everything the famous casino-resort has to offer, from world-class dining and top-notch entertainment to luxurious spas and state-of-the-art gaming. AP is pleased with the initial feedback and looks forward to returning to the venue for Connections 2018.

### **About American Portfolios**

Headquartered in Holbrook, N.Y., American Portfolios Financial Services, Inc. (AP) is a full-service, independent broker/dealer and member firm of FINRA and SIPC, offering a complete range of financial services, including personal financial and retirement planning, securities trading, mutual funds, access to investment research, long-term care



planning, insurance products and tax-free investing. Fee-based asset management is offered through its sister subsidiary, American Portfolios Advisors, Inc., (APA), an SEC Registered Investment Advisor. Both entities, along with technology entity American Portfolios Advisory Solutions, LLC, collectively reside under the legal entity American Portfolios Holdings, Inc. (APH). Full-service securities brokerage is available through a clearing firm relationship with Pershing, LLC, a BNY Mellon firm, the securities of which are held on a fully disclosed basis. The company currently serves 797 independent investment professionals located in 364 branch locations throughout the nation. It was named Broker-Dealer of the Year\* (Division III) by *Investment Advisor* magazine in 2015, 2016 and 2017, as well as one of the top five Best Small/Mid-Size Company to Work for in the state of New York for 2016 and 2017 by the New York State Society for Human Resources Management (NYS-SHRM) and the Best Companies Group (BCG).

*\*Based on a poll of registered representatives conducted by Investment Advisor magazine. Broker/dealers rated highest by their representatives are awarded "Broker/Dealer (B/D) of the Year."*

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