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American Portfolios Officially Launches HomePort, a Proprietary Technology Platform for Financial Advisors, Office Support and End Clients

HOLBROOK, N.Y. (Dec. 5, 2017) — American Portfolios Financial Services, Inc. (AP), a privately-held, independent broker/dealer which provides business solutions and support to financial advisors throughout the country, officially launched its proprietary technology platform, HomePort, which has been designed specifically for its affiliated investment professionals and their clients, as well as the firm's home office staff.

AP's strategic vision to find innovative solutions that brings the firm closer to greater platform and technology independence has made it possible to avail all of its affiliated investment professionals with a new and improved Web-based environment in which to work. "Our internal technology development team has created a new platform that allows all users—financial advisors, their support staff and their customers, as well as the firm's home office employees—to conduct day-to-day business and manage accounts in an efficient, intuitive and user-friendly manner," CEO Lon T. Dolber states of the independent broker/dealer's proprietary technology. "This initiative brings our goal of technological independence closer to achievement and will enable us to give our affiliated investment professionals more freedom to run their practices on their own terms."

Phase One of HomePort was unveiled at the firm's annual national conference, Connections 2017, where AP affiliated colleagues witnessed a live demo of the technology that replaced the previous operating environment, the AP Broker Web site. "We were thrilled to reveal HomePort after many long months of fine-tuning and beta testing the environment to meet our clients' expectations," said Executive Vice President of Technology Strategy Atindra Barua of HomePort's premiere. "There is no limit to what HomePort can achieve; it's entirely scalable, which is why user feedback is so important to this initiative. We are looking forward to all of the ways HomePort can expand and provide additional capabilities to ensure the success of our customers' practices and, in turn, their customers' financial futures."

The HomePort environment is tailored to each user's needs through single sign-on access (SSO), providing them with a streamlined user experience. HomePort's architecture brings together all of AP's proprietary technology—including STARS, the firm's main operations system through which all business and transactions are entered and recorded, and Portfolio Insight, the firm's custom-built advisory technology platform—as well as vendor-licensed programs and services, such as Albridge Wealth Reporting; NetX360, Pershing's digitally enabled wealth management platform; and CommWeb, a sales management software and performance measurement system through Xtiva Financial Systems. The platform features a diverse interface that includes every tool that an investment professional needs in order to run their practice and manage their clients' accounts, including, but not limited to, compliance, fixed income, general securities, insurance and product resources, as well as advisor-generated proposal reporting capabilities. It also includes a staging ground for an e-commerce environment, currently called "The Place," offering financial services business solutions to affiliated



investment professionals, with an initial rollout of models and strategies on the Nine Points Advisory Services Platform, under the firm's Registered Investment Advisory (RIA), American Portfolios Advisors, Inc. (APA).

HomePort also houses AP's communications channels: The Independent, a weekly digital newsletter that compiles the most newsworthy and timely company, product and financial services industry-related news items for investment professionals; peer-to-peer advisor forums; and the Studio 454 video library, which features digital presentations produced for its affiliated colleagues. Additional time-saving and organizational tools within the HomePort platform include a shareable, customizable calendar; notifications to alert investment professionals to action items; and a Salesforce-driven support area that links users to AP's back office for guidance and assistance.

American Portfolios looks forward to the limitless potential of HomePort, as well as its future technological endeavors, as it moves ever further along the path to platform and technology independence—making the firm a leader among independent broker/dealers.

About American Portfolios

Headquartered in Holbrook, N.Y., American Portfolios Financial Services, Inc. (APFS) 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 807 independent investment professionals located in 370 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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