AMERICAN PORTFOLIOS

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American Portfolios Financial Services Launches 2018 Connections Tour

HOLBROOK, N.Y. (Feb. 22, 2018)—American Portfolios Financial Services, Inc. (AP), a privately-held, independent broker/dealer that services financial advisors nationwide, has officially launched its 2018 Connections Tour. On Jan. 24, 2018, AP held the first regional meeting in the Connections Tour lineup at its headquarters in Holbrook, N.Y. According to attending affiliated colleagues, focus partners and home office staff members, the tour's inaugural meeting was charged with energy and enthusiasm, creating the momentum needed for success in the New Year.

Following a triumphant national conference—Connections 2017, which was held at Connecticut's Mohegan Sun—AP's relationship management team began building out a robust itinerary for 2018. "We've been hard at work developing a Connections Tour that's as diverse as our customers' needs," says President of Sales and New Business Development Tim O'Grady. "We're taking a fine-tuned approach to making sure the practice management topics that are top-of-mind for today's financial advisors are addressed so that they can come away from each event they attend with useful tools and information, as well as an actionable plan to implement when they return to their offices."

"We're always mindful of keeping the voice of the customer at the forefront of our conference planning," says Vice President of Sales Ken Aulbach. "Through post-event feedback and customer service surveys, we've been able to zero in on the things that our advisors need and care about most when it comes to business operations and meeting their client expectations. We're excited to roll out what we believe will be a very successful and enlightening Connections Tour."

Building upon the momentum of last year's theme, the 2018 Connections Tour focuses on providing direction for each advisor's practice and charting its route to success. With regional meetings, advisory-specific seminars, practice management events, networking opportunities and another strong lineup of the AP Webinar Series, the 2018 Connections Tour will be host to many gatherings that are specifically geared to advisors' wants and needs.

New this year is an even greater reliance on communications technology, such as live-streaming and online video. In an effort to reach more investment professionals, AP is live-streaming its business partner-sponsored lunch and learns, webinars and regional meetings. The firm's Manager of the Month program, which began in 2017, continues throughout 2018 with focus partner-centered lunch and learns, webinars and video presentations filmed in AP's media production facility, Studio 454, and distributed to the entire advisor community via the firm's dedicated digital newsletter, The Independent.

In recent years, AP has been extremely diligent in balancing the tour's content in order to provide optimal guidance and direction for every advisor's needs—whether they're making the switch from transactional to fee-based business or in the beginning stages of structuring a succession plan. Following the successful implementation of Leap into 2018, a business-building program that helped focus advisors on building assets across the firm's advisory programs, the firm launched an extension of the program, Step into 2019, geared to help advisors see the benefits of building more or including advisory services within their existing business mix. To that end, the 2018 Connections Tour agenda includes many advisory-focused topics and presentations.

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While last year's tour enabled attendees to forge connections with business industry contacts, this year will emphasize investment topics through panels and discussions geared towards advanced sales ideas that can be easily implemented into one's practice.

In addition to the well-established American Portfolios Advisor Council (APAC), a group of affiliated investment professionals who act as a liaison between the firm and all advisors and managers, AP has formed three new subcommittees, which center on practice management, succession planning and technology. Members of each subcommittee are comprised of AP home office staff, APAC representatives and advisors from the field. These subcommittees will afford Connections Tour attendees more nuanced ways to engage in peer-to-peer networking.

AP is looking forward to working with advisors in the field, providing sales ideas and solutions that address specific business needs for their practices and clients. The tour will culminate with the year's premiere event, AP's national conference, Connections 2018, which will once again be held at Mohegan Sun in Uncasville, Conn., on Oct. 24-26.

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 809 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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