



AMERICAN PORTFOLIOS FINANCIAL SERVICES, INC.  
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HOLBROOK, N.Y. 11741

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## **American Portfolios Financial Services Named One of the Top Long Island Workplaces for 2018 by Newsday**

HOLBROOK, N.Y. (Oct. 31, 2018)—[American Portfolios Financial Services, Inc.](#) (AP), a privately-held, independent broker/dealer that services financial advisors across the country, has been named one of the Top Long Island Workplaces for 2018 by Newsday. Among the 74 Long Island-based, small- to large-sized companies recognized, AP ranked No. 4 out of 42 small employers with 50-149 workers.

“Everyone at American Portfolios is extremely proud of this recognition,” states Vice President of Human Resources Lisa DiBella. “The firm strives to create an environment in which its employees feel happy, accepted and worthy.” Chief Administrative Officer Dalchand Laljit adds, “We wholeheartedly believe that happy employees equal happy clients. This recognition further exemplifies how the amount of thought and effort American Portfolios puts into nurturing its performance culture is paying dividends.”

The formal announcement was given during an event held at the Crest Hollow Country Club in Woodbury, N.Y., on Wednesday, Oct. 24, 2018, which was hosted by News 12 Long Island's Carol Silva. This latest recognition stands among AP's ranking within the Top 10 Best Small- to Mid-sized Companies for 2018 (three years' running) by NYS-SHRM and The Best Companies Group, as well as the firm being named Division III Broker/Dealer of the Year for 2018 by Investment Advisor magazine\* (four consecutive years).

Beginning in February 2018, Newsday partnered with the consulting and research firm Energage to anonymously poll the organizations that agreed to take part in the survey. The employee survey covered key factors, including how workers viewed their workplaces in terms of alignment (e.g., where the company is headed, its values, cooperation); effectiveness (e.g., doing things well, sharing different viewpoints, encouraging new ideas); connection (e.g., employees feel appreciated, their work is meaningful), “My Manager” (e.g., cares about concerns, helps employees learn and grow); employee engagement (e.g., motivation, retention, referral); leader (e.g., confidence in company leadership); and “The Basics” (e.g., pay, benefits, flexibility, training, expectations). Employees were asked to rank their responses on a seven-point scale that ranged from “Strongly Agree” to “Strongly Disagree.”

AP's current count of 100-plus employees work collaboratively to service the business needs of 823 independent investment professionals, as well as their affiliated assistants and support staff, located in 380 branch offices throughout the United States. Employees are part of a corporate culture that embraces the tenets of the company's strategic roadmap for sustainable growth, which is built on six equally important, interconnected strategic company perspectives—People, Innovation, Process, Customer, Financial and Community—and the foundation from which all planning and executions are derived.



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AP continually strives to ensure that its employees are afforded a positive and supportive work environment. Employees receive a robust benefits package, inclusive of health insurance, free life insurance, unprecedented 401(k) matching, stock options, bonus incentives, and performance and service awards. The firm is highly invested in the educational betterment of its employees, offering tuition reimbursement, free license testing, and unlimited training seminars and courses. The company also provides Six Sigma training, which helps staff members to firmly establish the “Voice of the Customer,” resulting in the ability to exceed client needs and expectations. The company also recognizes the importance of work-life balance by offering employees a flexible work schedule, health and wellness lunch and learns, appreciation events, massage sessions and private coaching sessions with a registered dietician. In 2017, the firm implemented several new initiatives, including an employee mentorship program designed to nurture AP’s emerging business leaders, shortened working hours on Fridays throughout the year and a casual dress code. At the start of 2018, AP employees began receiving full pay for up to a maximum of 12 weeks of leave while out on FMLA in order to maintain financial stability; employees also began formal training in the AP W.E.L.C.O.M.E. Treatment, a five-module program that instills the firm’s core customer service principles.

As an integral part of its strategic focus, engrained in its corporate culture is a keen awareness to the community by taking part in socially responsible programs, such as its ongoing association with non-profit organizations like World T.E.A.M. (WT), which organizes athletic events for disabled and able-bodied citizens to achieve a common goal. Employees actively volunteer, coach and compete in WT events, such as the annual Face of America Bike Ride, Coastal Team Challenge and Adventure Team Challenge, which is conducted through the firm’s long-standing support of The Center for Discovery, a non-profit research and innovation center that provides high-quality programs and unique opportunities for children and adults who have complex disabilities, medical frailties and Autism Spectrum Disorders (ASD). The firm also has an enduring relationship with Virtual Enterprises International, Inc. (VEI), an experiential learning program that fosters the nation’s future business leaders through the hosting and judging of business plan competitions, and facilitating summer interns at the corporate offices and practices of its investment professionals through its AP-VEI Fellows Internship Program.

### **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



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relationship with Pershing, LLC, a BNY Mellon firm, the securities of which are held on a fully disclosed basis. The company currently serves 823 independent investment professionals located in 380 branch locations throughout the nation. It was named Broker-Dealer of the Year\* (Division III) by Investment Advisor magazine in 2015, 2016, 2017 and 2018. The firm was also named one of the top 10 Best Companies to Work for in the state of New York for 2016, 2017 and 2018 by the New York State Society for Human Resources Management (NYS-SHRM) and the Best Companies Group (BCG), as well as a Top Long Island Workplace for 2018 by Newsday.

*\*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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