



AMERICAN PORTFOLIOS FINANCIAL SERVICES, INC.
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American Portfolios Financial Services Hosts Record-Breaking Annual National Conference at Mohegan Sun

HOLBROOK, N.Y. (Nov. 12, 2018)—[American Portfolios Financial Services, Inc.](#) (AP), a privately-held, independent broker/dealer that services financial advisors across the country, recently hosted its annual national conference, Connections 2018, 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. 24 and concluded on Oct. 26, provided the perfect forum for its attendees to come together to learn, network and exchange ideas on building their business.

“Our dedicated team works diligently every year to create the best possible conference for AP’s affiliated colleagues—and this year they exceeded everyone’s expectations,” states President of Sales and New Business Development Tim O’Grady. “With a fully-loaded agenda offering a variety of keynote presentations from well-respected speakers, educational breakout sessions and live demonstrations between meetings of AP-driven initiatives and technology, the engagement among attending investment professionals, staff members and partners exemplified the very essence of Connections.”

While at Connections 2018, attendees were exposed to industry-relevant thought leadership presentations, including four esteemed keynote speakers: former sports agent turned entrepreneur, Molly Fletcher; U.S. Army veteran and motivational speaker, Col. Gregory D. Gadson; elite speaker and strategic business consultant, C. Richard Weylman; and senior investment strategist for OppenheimerFunds, Brian Levitt.

Full attention was given at a well-attended State of the Firm address from American Portfolios CEO Lon T. Dolber, who spoke in-depth about how the velocity AP gained in the last two years has created the momentum that drives the firm and its affiliated professionals to a profitable, sustainable and purposeful future. “We believe that advisors can do more to create operational leverage, scale and high-value services,” Dolber imparts. “In 2017, we began the process of taking long-term, proactive steps to develop more platforms and programs that would enable our investment professionals to achieve greater practice productivity. That is why it was so important to have conference-ready deliverables to share with our advisors and help them to implement in time for the coming year. ”

Through AP’s continued commitment to platform and technology independence and increased focus on sustainability, the firm has been able to make great strides in its goal to provide its affiliated investment professionals with the services and support they need to run a thriving practice and to plan the best financial futures for their clients. At Connections 2018, the independent broker/dealer revealed new and exciting technological initiatives, including: the rollout of its own Unified Managed Account (UMA), a professionally-managed private investment account that can include multiple types of investments all in one single account with one statement,



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digital account opening and simplified model management; approved usage of MyRepChat, a practice management tool that lets advisors contact clients via text messaging in a compliant environment; Advisor Support Center (ASC) Live Chat, through which AP investment professionals will soon gain support from the firm's advisor support specialists through a live chatting interface for an elevated customer service experience; Virtual Administrative Services, which enables advisors to gain remote access to AP team members who will provide administrative assistance; increased functionality of HomePort – Client Access that allows investors to view their account balances, update their New Account Form (NAF) information and seamlessly log into NetX Investor; AP Advisor Council (APAC) Corner, a new microsite that allows investment professionals to engage with APAC members on relevant topics and firm initiatives; Cybersecurity Auditing Program for Endpoints (CAPE), a firm-wide program that addresses cybersecurity threats and increasing regulatory needs through partnership with the FCI platform, Protectit; and a new phase of E-Signature functionality, which allows for Pershing forms to be eligible for E-sign from within STARS, the firm's main business processing back office solution.

Attendees were given live demos of these new and enhanced technological initiatives, in addition to its full suite of Web-based business solutions via several 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, among many other Web-service offerings essential in the day-to-day operations of the firm's valuable investment professionals.

With respect to AP's commitment to corporate social responsibility, Connections 2018 also included two big announcements concerning the firm's long-standing relationships with two non-profit organizations: World T.E.A.M. (WT), a national non-profit organization that brings adaptive and able-bodied athletes together by empowering, enabling and engaging individuals through inclusive athletic events; and The Center for Discovery (The Center), a major research and specialty center that offers residential, medical and special education programs. During his State of the Firm Address, Dolber welcomed WT CEO and President Jon Brideau to announce that through an increase in its support the firm has been recognized as the presenting partner for the May 3-5, 2019 Face of America (FOA) Gettysburg cycling challenge. Dolber also welcomed The Center's Vice President of Development Bill Evans to announce the firm's significant support of the development of the American Portfolios Assistive Technology Laboratory, which will expand opportunities for individuals with a range of complex conditions to overcome barriers and increase functioning.

An evening was also spent celebrating AP's fourth consecutive win of Broker/Dealer of the Year by Investment Advisor magazine at the annual banquet awards dinner on Thursday, Oct. 25. 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.



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Connections 2018 also provided plenty of leisure time in which to enjoy one of New England's most exciting destinations, Mohegan Sun. Topping off the first night of the conference, guests convened at Mohegan Sun's Cabaret Theater to watch a live performance of That Motown Band, of which Dolber is a member. The live show featured Billboard-chart-topping recording artists La La Brooks of The Crystals, Garfield Fleming of The Delfonics and Ryan Shaw from Motown: The Musical. In addition, 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 has been proud to host its national conference at Mohegan Sun for the past two years and looks forward to returning to the venue for Connections 2019.

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 820 independent investment professionals located in 379 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, as well as 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).

**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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