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American Portfolios Places in Top 5 Medium Best Companies to Work for in New York State for 2019

HOLBROOK, N.Y. (May 8, 2019)—For the fourth consecutive year, American Portfolios Financial Services, Inc. (AP), a privately-held, independent broker/dealer that services financial advisors across the country, has been ranked within the top Best Companies to Work for in New York State for 2019 by the New York State Society for Human Resources Management (NYS-SHRM) and the Best Companies Group (BCG). AP was ranked No. 5 among the 23 medium-sized New York businesses in the category of employers with 100-249 United States employees. Among a select group of New York-based companies across varying industries, AP was honored at the program's 12th annual awards ceremony, which took place on April 24, 2019, in Albany, N.Y.

“It’s been a long-held and firm belief of mine that a good company cannot become a great one if it doesn’t put their people first and foremost,” states AP CEO Lon T. Dolber. “At American Portfolios, we endeavor to make sure our employees are happy, knowing that they will deliver optimal customer service when their needs are met.” Vice President of Human Resources Lisa DiBella shares this sentiment. “We are so proud to be once again included in this elite group of New York’s top employers,” says DiBella, who firmly believes the company’s core values directly contributed to earning this recognition for a fourth time. “At American Portfolios, we continuously strive to create a nurturing and welcoming work environment, realizing that when you treat your people well, they are better equipped to do their jobs and are more motivated to go the extra mile.”

The annual awards are part of a program that identifies, recognizes and honors the best places of employment in New York, whose practices benefit the state’s businesses, economy and workforce. AP has been formally recognized by the NYS-SHRM and the BCG in the category of small/medium-sized employers since 2016. These accomplishments directly correlate to the firm’s noteworthy achievement of having been named Broker/Dealer of the Year four times in a row (2015, 2016, 2017 and 2018) by Investment Advisor magazine.

AP’s 100-plus employees work collaboratively to service the business needs of 836 independent investment professionals, and their affiliated assistants and support staff located in 386 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.



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 and robust customer service guidance, which helps staff members to firmly establish the “Voice of the Customer,” resulting in the ability to consistently exceed client needs and expectations. Additionally, the company recognizes the importance of work-life balance by offering employees a flexible work schedule, shortened working hours on Fridays throughout the year, a casual dress code, appreciation events, massage sessions, health and wellness lunch and learns, and private coaching sessions with a registered dietician. AP employees also receive full pay for up to 12 weeks of leave while out on FMLA in order to maintain financial stability. The firm has also enacted an employee mentorship program that is designed to nurture AP’s emerging business leaders.

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, including the annual Face of America bike ride, Coastal Team Challenge and Adventure Team Challenge. The firm also has a long-standing relationship with Virtual Enterprises International, Inc. (VEI), an experiential learning program that fosters the nation’s future business leaders, by hosting and judging business plan competitions, as well as facilitating summer interns at the corporate offices and practices of its investment professionals through its Internship Fellows 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 relationship with Pershing, LLC, a BNY Mellon firm, the securities of which are held on a fully disclosed basis. The company currently serves 836 independent investment professionals located in 386 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 Best Companies to Work for in the state of New York for 2016, 2017, 2018 and



2019 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.”

About NYS-SHRM and the BCG

The NYS-SHRM operates as an affiliate of the nation’s SHRM, which is the world’s largest association devoted to serving the needs of and advancing the interests of the human resources profession. The BCG is an independent firm that manages the Best Places to Work programs on state, regional and national levels worldwide. The process of selection consists of two parts: a questionnaire completed by the employer, which details company policies, practices, benefits and demographics; and an employee engagement and satisfaction survey, which allows employees to rate their employer on a variety of practices, culture and overall fulfillment. The BCG conducts, analyzes and evaluates the surveys to reveal the 70 best companies to work for in the state of New York for the following year.

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