



AMERICAN PORTFOLIOS FINANCIAL SERVICES, INC.
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American Portfolios Restructures Sales and New Business Development Team to Better Serve the Firm's Advisor Community

HOLBROOK, N.Y. (June 5, 2019)—Coasting on the momentum gained from 2018, [American Portfolios Financial Services, Inc.](#) (AP)—a privately-held, independent broker/dealer that services financial advisors nationwide—has restructured its sales and new business development area to better address the needs of its existing and prospective advisor relationships.

Since the restructuring in late 2018 and early 2019, AP's sales and new business development team has been aggressively honing in on existing customer needs and new client acquisition. "One of our year-end goals was to create a more cohesive sales team leading into the New Year. We've fully implemented this initiative by changing up the roles of existing key team members and making strategic new hires," states President of Sales and New Business Development Timothy O'Grady. "As the firm continues to grow, we felt that we needed to diversify some of our team members' responsibilities by dividing up same-store sales and recruitment to better target client and prospect needs."

Among the newly-restructured roles is David Molter, who has been promoted to vice president of new business development and advisor relations. Molter now oversees the team responsible for sales reporting, customer-facing initiatives and AP-affiliated, advisor-centered goals. "The firm understands the importance of continuing to deliver products, tools and ideas to help our affiliated financial advisors grow their practices in order to better serve their new and existing clients," states Molter. "These are the areas that myself, Vice President of Sales Kenneth Aulbach and other key members of the team will be focused on more closely going forward."

Joining Molter's team in the second-quarter is Director of Practice Management Corey M. Brodsky, former regional vice president of business development for W.E. Donoghue & Co., in Boston, Mass. Brodsky brings to AP nearly 20 years of financial services industry experience with significant knowledge of relationship management, advisor growth, client relations, platform maintenance/development, and sales in the manufacturing and distribution of multiple product types. In his current role, Brodsky is working to further build out AP's practice management capabilities through growing and maintaining a segmentation of investment professionals, and interfacing with the firm's affiliated investment professionals to develop actionable plans to scale and grow their practices in the most effective and efficient of manners. Additionally, Director of Insurance Products Keith Carravone continues to grow the firm's insurance platform by bringing valuable product options to the attention of AP's affiliated financial professionals.

Sales and New Business Development Consultant Carl Kirchner will be working on the recruitment side, focusing on onboarding presentations, coordinating with the firm's transitions area to welcome new advisors and collaborating with recently-hired Business Sales Consultant Mark Ferro, who provides recruiting support and intelligence to the firm. Ferro, formerly of OppenheimerFunds, joined the firm in the first quarter of 2019; in addition to his recruiting responsibilities, he also works closely with Director of Sales Operations Kristina Garrison on building relationships with new and existing focus partners.



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At present, the sales and new business development team is working diligently to bring the firm's investment professionals a series of Connections Tour meetings leading up to AP's annual national conference, Connections 2019, which will be held Oct. 23-25 at Mohegan Sun in Uncasville, Conn.

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 839 independent investment professionals located in 390 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 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."*

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