



AMERICAN PORTFOLIOS FINANCIAL SERVICES, INC.  
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## American Portfolios Officially Launches 2019 Connections Tour

HOLBROOK, N.Y. (June 17, 2019)—American Portfolios Financial Services, Inc. (AP)—a privately-held, independent broker/dealer that services financial advisors nationwide—officially launched its 2019 Connections Tour on May 13-14 in Orlando, Fla., at the upscale Marriott Grand Vista hotel. The Florida meeting was followed by two regional events that took place on May 22 at the Hyatt Regency Long Island in Hauppauge, N.Y. and on June 12 at the Cleveland Indians Ballpark at Progressive Field in Cleveland, Ohio. Each of the tour stops were widely attended by the firm’s affiliated colleagues, focus partners and home office staff members.

Following what was AP’s most well-attended national conference to date—Connections 2018, which was held at Connecticut’s Mohegan Sun—the sales and new business development team began building out an expansive itinerary for 2019, planning targeted meeting agendas focused on providing AP’s affiliated investment professionals with value-added programs, tools, services and insights to support the growing demands of their practices and clients. “This year, we’re putting the focus on practice management. We want to help our financial advisors grow their private practices by developing the right habits,” states President of Sales and New Business Development Tim O’Grady. “It’s a start-to-finish focus, from helping them build out their business to setting up a succession plan.”

The goal of the 2019 Connections Tour is to share long-term solutions with affiliated colleagues that ensure their independence, help them combat price compression and look toward a sustainable future. The American Portfolios Advisor Council (APAC), a group of affiliated investment professionals who act as a liaison between the firm and all advisors and managers, has been essential in the tour’s planning, providing vital feedback on which to build out agendas. APAC has also been instrumental in holding the much sought-after peer-to-peer networking breakout sessions at each conference.

In July, the firm will be holding two advisory-focused meetings in Denver, Colo. (Hyatt Regency Denver Tech Center, July 9-10) and Jersey City, N.J. (Pershing Headquarters, July 16), which will cover the value and ease of doing advisory business, as well as the systems and money managers AP has in place to further that goal. “The advisory-focused meetings are geared to our affiliated financial advisors who are focusing on further developing their advisory business to adopt to the overwhelming trend in our industry,” states President of APA Gary Gordon. “Our July meetings will provide them with the opportunity to get trained, educated and put them alongside peers who have done advisory business so they can share ideas and hopefully alleviate any fears of conducting fee-based business.”

The Denver and Jersey City meetings will introduce and/or familiarize investment professionals with the services provided by the firm’s Registered Investment Advisor (RIA), American Portfolios Advisors, Inc. (APA), including the products available to them on the American Portfolios Advisory Services Platform; these include two management options—advisor-managed and institutionally-managed—and its proprietary Nine Points Investment Management Models.

In the fall, AP will host its annual Leaders Conference (Sept. 5-8 in Nashville, Tenn.) to recognize its top-performing investment professionals, followed by its annual national conference, which is back by popular demand at Mohegan Sun in Uncasville, Conn., from Oct. 23-25.



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## **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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