



AMERICAN PORTFOLIOS FINANCIAL SERVICES, INC.  
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## **American Portfolios Financial Poised to Host Annual National Conference at Mohegan Sun**

HOLBROOK, N.Y. (Oct. 21, 2019)—[American Portfolios Financial Services, Inc.](#) (AP)—a privately-held, independent broker/dealer that services financial advisors nationwide—is poised to host its annual national conference, Connections 2019, at Mohegan Sun in Uncasville, Conn. As a business solutions provider serving approximately 850 affiliated investment professionals throughout the United States, the three-day event, which is set to begin on Oct. 23 and run through Oct. 25, is the perfect forum for its network of affiliated, independent financial professionals in private practice, valued business partners and members of home office staff to come together with the aim to learn, network and exchange ideas.

“Each year, we strive to outdo the last, and we feel we’ve succeeded in building the most value-added agenda for this national conference,” states President of Sales and New Business Development Tim O’Grady. “Connections 2019 will feature a variety of keynote presentations from notable speakers, educational breakout sessions and live demonstrations of AP-driven initiatives and technology. We’ve paid close attention to our colleagues’ business needs and made sure to include the kind of engagement they’re looking for in order to achieve success in their financial planning practices.”

While at Connections 2019, attendees will be treated to industry-relevant, thought leadership presentations, including three esteemed keynote speakers: former NFL player, author and famed magician Jon Dorenbos, a finalist on NBC’s America’s Got Talent; author, speaker and CEO of Corgenius, Amy Florian; and economic forecaster Mark Zinder. In addition, AP CEO Lon T. Dolber will give his annual State of the Firm address, during which he will share his thoughts on the financial services industry, provide an overview of what AP has accomplished over the last year and an outlook on what’s ahead for the independent broker/dealer.

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 plan the best financial futures for their clients. This year is no different as Connections 2019 will see the rollout and launches of several new and exciting technology initiatives, including: 1) the expansion of its Unified Managed Account (UMA) program—Unified Solutions, on AP’s Advisory Services Platform—a professionally-managed private investment account that can include multiple types of investments all in one single account with one statement, digital account opening and simplified model management; 2) Virtual Administrative Services, AP’s first subscription-based model, which enables advisors to gain remote access to AP team members who will provide administrative assistance; 3) further promotion of the firm’s Going Green initiative, which utilizes many of the firm’s proprietary and third-party platforms in a manner consistent with sustainability; 4) AP Advisor Council (APAC) Corner, a new microsite that allows



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investment professionals to engage with APAC members on relevant topics and firm initiatives; 5) Advisor Dashboard, an analytics dashboard for a financial advisors' book of business; and 6) BlueDock, a digital platform for prospective and existing clients that gathers information through financial tools on home buying, retirement and college savings to initiate mutually-agreeable conversations that result in the seamless establishment of new accounts. Attendees will be afforded live demos of these new and enhanced technological initiatives, in addition to its full suite of Web-based business solutions via several AP Platform exhibits that will be situated in the event's main thoroughfare. AP staff members will be 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.

Guests will also enjoy an evening spent celebrating AP's fifth consecutive win of Broker/Dealer of the Year by Investment Advisor magazine at the annual banquet awards dinner on Thursday, Oct. 24. During this event, the firm will recognize 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.

Connections 2019 will also provide 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 will convene at Mohegan Sun's Wolf Den to watch a live performance of That Motown Band, of which Dolber is a member. The live show will feature Garfield Fleming of The Delfonics, soul sensation Brian Owens, Ryan Shaw from Motown: The Musical and guitarist extraordinaire Johnny Gale. In addition, attendees will be able to spend their downtime enjoying everything the famous casino-resort has to offer, from world-class dining and top-notch entertainment to luxurious spas.

### **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 854 independent investment professionals located in 398 branch locations throughout the nation. It was named Broker-Dealer of the Year\* (Division III) by Investment Advisor magazine in 2015, 2016, 2017, 2018 and 2019; a wealthmanagement.com 2019 Industry Award Finalist in the category of Enhanced Customer Service Support\*\*; one of the Best Companies to Work for in the state of New York for 2016, 2017, 2018 and 2019



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by the New York State Society for Human Resources Management (NYS-SHRM) and the Best Companies Group (BCG); and one of the Top Long Island Workplaces 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."*

*\*\* Wealthmanagement.com Industry Award finalists are selected by a panel of independent judges made up of subject matter experts in the industry. Award is based on support provided to AP's affiliated people, and does not reflect public customers nor their account performance.*

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