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American Portfolios Launches BlueDock, a Digital Prospecting Tool for Tying in New Business

HOLBROOK, N.Y. (Dec. 18, 2019)—American Portfolios Financial Services, Inc. (AP)—a privately-held, independent broker/dealer that serves financial professionals nationally—is pleased to announce that it has recently launched BlueDock, a practice management prospecting and back office tool for tying in new business.

“It has always been AP’s commitment to provide our affiliated investment professionals with value-added services that keep them relevant in a changing marketplace,” states AP CEO Lon T. Dolber. “In an electronic age where flexibility and convenience are not the exception, but rather the norm, we’re determined to make sure our advisors have the tools and support they need to create scale in their practices in order to better serve investing consumers.”

BlueDock is a digital prospecting tool for acquiring new clients and business; it streamlines both practice management and back office functions by engaging prospective and existing clients in the data-gathering process, thereby creating scale in an investment professional’s practice to dedicate more time for fostering new client relationships and strengthening existing ones.

Offering a simple user interface and intuitive functionality, through BlueDock, prospective and existing clients—along with their family members—are invited via e-mail or direct link through the practitioner’s Web site to explore and/or review their financial goals using a series of calculators for retirement, college planning, wealth management or purchasing a home. With seamless integration into any practice, BlueDock leverages an investment professional’s ability to set the parameters, and adjust or customize the environment with their own business branding. Furthermore, by tailoring the prospecting and engagement process with customized fact-finding instructions that dictate the type and amount of information being gathered, and tracking the progress made through a dashboard, affiliated colleagues determine the point at which a prospect or existing customer may formally take the relationship to the next level; that is the point at which collected data can then be uploaded with the intended purpose of—at the click-of-a-button—establishing a New Account Form (NAF) in AP’s STARS business processing system without rekeying the information and begin conducting business.

Attendees of the firm’s national annual conference, Connections 2019, were given a sneak peek at the new practice management tool and feedback was extremely positive. BlueDock’s engaging presentation resonated with colleagues as a useful application that could prove meaningful in the growth and future of their practices. The firm officially rolled out the initiative to affiliated advisors less than two months later, on Dec. 13.



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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 864 independent investment professionals located in 406 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 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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