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American Portfolios Chosen as One of the Best Companies to Work for in New York State for Fifth Year in a Row

HOLBROOK, N.Y. (Jan. 29, 2020)—For the fifth consecutive year, American Portfolios Financial Services, Inc. (AP)—a privately-held, independent broker/dealer that services financial advisors across the country—has been named one of the Best Companies to Work for in New York State for 2020 by the New York State Society for Human Resources Management (NYS-SHRM) and the Best Companies Group (BCG). 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 is honored to be recognized for the fifth time by this notable awards program," states Vice President of Human Resources Lisa DiBella. "The firm is ever-committed to maintaining an environment in which its employees feel fulfilled, respected and valued." Chief Administrative Officer Dalchand Laljit adds, "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."

In 2016, AP was formally recognized by the NYS-SHRM and the BCG in the category of small/medium-sized employers, in which the firm ranked No. 1. The independent broker/dealer once again ranked within the top 10 in 2017, 2018 and 2019.

AP's 100-plus employees work collaboratively to service the business needs of 825-plus independent investment professionals and their affiliated assistants, as well as support staff, located in 396 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. AP 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, ingrained in its corporate culture is a keen awareness to the community by taking part in many socially responsible programs through its non-profit, American Portfolios Foundation, namely its ongoing association with other 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. 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 AP-VEI Internship Fellows Program.

The firm's human resources and corporate communications representatives look forward to attending the NYS-SHRM and BCG annual awards ceremony, which will be held May 5 in Albany, N.Y., to learn of the company's official ranking for 2020.

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 826 independent investment professionals and registered assistants located in 396 branch locations throughout the nation. In addition to being named one of the Best Companies to Work for in the State of New York for five consecutive years, it was named one of the Top Long Island Workplaces for 2018 by Newsday; Broker-Dealer of the Year* (Division III) by Investment Advisor magazine in 2015, 2016, 2017, 2018 and 2019; and a wealthmanagement.com 2019 Industry Award Finalist in the category of Enhanced Customer Service Support.**

** 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.*



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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