



AMERICAN PORTFOLIOS FINANCIAL SERVICES, INC.
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American Portfolios Unveils New and Improved Advisor Dashboard, a Tool Built for Investment Professionals Conducting Fee-Based Business

HOLBROOK, N.Y. (March 31, 2020) — American Portfolios Financial Services, Inc. (AP)—a privately-held, independent broker/dealer which provides business solutions and support to financial advisors throughout the country—recently unveiled an enhanced update of its proprietary technology tool, Advisor Dashboard, which has been designed primarily for its affiliated investment professionals who conduct fee-based advisory business.

“This new technology advancement will have a meaningful impact on the practices of AP advisors,” states AP-affiliated investment professional Gus Catanzaro (PPS Advisors; Holbrook, N.Y.), a member of the American Portfolios Advisor Council (APAC) on which he serves as lead for the Technology Subcommittee that was formed to focus on best practices and build those principles into tools from which AP advisors can leverage knowledge. “Based on input and suggestions from AP’s advisor community, the firm and APAC have made sweeping efforts to update and enhance the existing Advisor Dashboard for a new and improved user interface. We are proud to present an Advisor Dashboard that was built by our advisors, for our advisors—all to help them better manage their businesses.”

The new Advisor Dashboard provides AP advisors a dynamic view of their businesses, affording them the increased ability to scale their operations by giving them a hierarchical, at-a-glance overview of the health of their practices.

Further explains EVP of Technology Strategy Atindra Barua, whose technology team worked closely with APAC to ensure advisor expectations were met, “The tool shows AP’s affiliated colleagues the monies that have gone in and out, as well as accounts opened and closed, which are refreshed daily through overnight data updates. Essentially, it allows them to ‘slice and dice’ their business by segmenting their client base so they can focus on the areas in which they want to grow or reduce.”

In keeping with AP’s strategic vision to find innovative solutions that bring the firm closer to greater platform and technology independence, this expansion of the Advisor Dashboard gives the firm’s affiliated financial advisors multiple ways to analyze their business and identify areas of growth, as well as problem areas that need to be addressed to ensure overall success. Everything is automated in a comprehensive, yet concise, manner—giving investment professionals back the time they spend manually reporting this vital information so they can focus on nurturing existing client relationships and forging new ones.

AP’s Advisor Dashboard is built within HomePort, AP’s Intranet environment that is tailored to each user’s needs through single sign-on access (SSO), providing them with a streamlined user experience. HomePort’s architecture brings together all of AP’s proprietary technology—including STARS, the firm’s main operations system through which all business and transactions are entered and recorded, and Portfolio Insight, the firm’s custom-built advisory technology platform—as well as vendor-licensed programs and services, such as Albridge Wealth Reporting; NetX360, Pershing’s digitally enabled



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wealth management platform; and CommWeb, a sales management software and performance measurement system through Xtiva Financial Systems. The platform features a diverse interface that includes every tool that an investment professional needs in order to run their practice and manage their clients' accounts, including, but not limited to, compliance, fixed income, general securities, insurance and product resources, as well as advisor-generated proposal reporting capabilities. It also includes a staging ground for an e-commerce environment, currently called "The Place," offering financial services business solutions to affiliated investment professionals, with models and strategies on the American Portfolios Advisory Services Platform, which is home to Nine Points Investment Management, under the firm's Registered Investment Advisory (RIA), American Portfolios Advisors, Inc. (APA).

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 supports 842 independent investment professionals—inclusive of registered assistants—and more than 375 non-registered associates, located in 394 branch locations throughout the nation. It was named Broker-Dealer of the Year* (Division III) by Investment Advisor magazine for five consecutive years (2015-2019); 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 four consecutive years (2016-2019) 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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