



AMERICAN PORTFOLIOS FINANCIAL SERVICES, INC.
4250 VETERANS MEMORIAL HWY. | SUITE 420E
HOLBROOK, N.Y. 11741

FOR IMMEDIATE RELEASE, CONTACT:
Melissa Grappone, VP of Marketing & Corp. Comm.
PHONE: 631.870.8208
E-MAIL: mgrappone@americanportfolios.com

American Portfolios Enhances AP Advisory Platform Via Strategic Partnership with SMArtX Advisory Solutions

HOLBROOK, N.Y. (Sept. 22, 2020) — [American Portfolios Financial Services, Inc. \(AP\)](#)—a privately-held, independent broker/dealer that services financial advisors across the country—announces a strategic new partnership with [SMArtX Advisory Solutions](#) (SMArtX), a leading innovator in unified managed accounts (UMA) technology and architect of the SMArtX turnkey asset management platform (TAMP). SMArtX’s unique brand of fintech will help to integrate major enhancements to the American Portfolios (AP) Advisory Platform, whereby the firm’s affiliated investment professionals doing advisory business will now be provided with a single interface in which to access and manage third-party managed and/or rep-directed accounts.

“Over the last several years, we have remained committed to the objectives stated in our strategic roadmap—more specifically, under the perspective of Innovation, to provide a leading advisory platform for our affiliated financial advisors,” states CEO Lon T. Dolber. “Faced with the demands of a highly-competitive environment, as a solutions provider, we are always searching for ways to make it easier for our colleagues to conduct business, which inevitably brings greater value to the diversified practices affiliated with our firm.”

“We are very excited about the strategic partnership we’ve formed with SMArtX, which serves as the technology component of AP’s Advisory Platform,” states Gary Gordon, president of American Portfolios Advisors, Inc. (APA), the firm’s Registered Investment Advisor (RIA). “We are diligent in seeking continuous feedback from our advisors and responses have deemed this enhancement a necessity for them to better serve their clients. Through this advanced technology, advisors can utilize robust tools for portfolio building, drift management and rebalancing to drive the growth of their advisory business.”

“On behalf of SMArtX, we are thrilled to be partnered with AP on this exciting, new venture,” states SMArtX CEO Evan Rapoport. “This partnership will allow AP’s investment professionals to achieve operational excellence, while improving their productivity and meeting their clients’ expectations and objectives. The AP Advisory Platform, powered by SMArtX, is the next evolution in managed accounts technology.”

AP’s Advisory Platform provides a single interface to manage investment strategies through a UMA/SMA structure. It delivers an integrated technology solution to drive productivity gains that supports an independent business model. The platform leverages advanced capabilities to see intra-day performance, research strategies, build portfolios and maintain allocations simultaneously across multiple accounts.

Utilization of the American Portfolios Advisory Platform offers substantial business advantages that include Advisor as a Portfolio Manager (APM) tools; proposal generation; research on institutional money managers; real-time pricing; real-time, sleeve-level reporting; and tax harvesting. Irrespective of an advisor’s chosen custodian—be it self-directed with

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customized portfolios or utilizing third-party managers—this offering is available to any AP affiliate doing advisory business and interested in leveraging new and enhanced technology. With respect to due diligence, every actively-managed investment firm on AP's Advisory Platform is subject to the same investigative vetting process, where they are assessed based on leadership, philosophy and investment performance.

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, 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 861 independent investment professionals—inclusive of registered assistants—and more than 375 non-registered associates, located in 403 branch locations throughout the nation. It was named [Broker-Dealer of the Year*](#) (Division III) by Investment Advisor magazine for six consecutive years (2015-2020); a 2019 and 2020 [WealthManagement.com Industry Award Finalist](#) in multiple categories, and the 2020 winner in the service category of B/Ds under 1,000 representatives for its Virtual Administrative Services (VAS) program**; one of the [Best Companies to Work for in the state of New York](#) for five consecutive years (2016-2020) 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 and 2019 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.*

About SMArtX Advisory Solutions

SMArtX Advisory Solutions is the next generation managed accounts technology provider and manages SMArtX, a turnkey asset management platform and the only platform to seamlessly offer traditional, alternative, and passive direct index strategies in a unified managed account structure. The firm also uses its proprietary trading and managed accounts technology to power SS&C Advent's integrated unified managed account solution. Learn more about SMArtX Advisory Solutions at www.smartxadvisory.com.

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