



AMERICAN PORTFOLIOS FINANCIAL SERVICES, INC.
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American Portfolios Financial Services Hosts First-Ever Virtual National Conference to Much Acclaim

HOLBROOK, N.Y. (Nov. 9, 2020)—[American Portfolios Financial Services, Inc.](#) (AP)—a privately-held, independent broker/dealer that services financial advisors nationwide—hosted its first-ever virtual national conference, Connections 2020, with praiseful feedback from attendees. As a business solutions provider serving approximately 860 affiliated investment professionals throughout the United States, the three-day interactive, Web-based forum held Oct. 21 – 23 was well-attended and served as an exemplary venue alternative for its network of affiliated investment professionals in private practice, valued business partners and members of home office staff, gathering with a common purpose to learn, network and exchange ideas.

“While this year certainly presented challenges for hosting our annual national conference in the manner we are accustomed to, nevertheless we aimed to ensure that the experience our valued colleagues had at Connections 2020 came as close to the real thing as possible,” states American Portfolios President Tim O’Grady. “It was important for us to provide AP’s affiliated financial advisors with a multitude of business building, educational and networking activities in a virtual environment, as well as feature top-notch speakers with engaging presentations.”

“The feedback we have received from attendees has been incredible,” Vice President of New Business Development and Advisor Relations David Molter adds. “It was our goal to present a content-rich conference that conveyed our culture and allowed our advisors opportunities to connect during a time when we can’t be face-to-face. We paid close attention to the needs of our affiliates, making sure the agenda was packed with plenty of value-added takeaways they need in order to achieve success in their practices.”

Connections 2020 hosted a variety of keynote presentations, educational breakout sessions and live demonstrations of AP-driven initiatives and technology. Several events held during the virtual conference were streamed live from AP’s home office and its media production facility, Studio 454. A key number of staff were on hand to manage on-site operations while the majority of employees worked remotely to fulfill all other aspects of conference coordination and implementation particulars.

While at Connections 2020, attendees were treated to industry-relevant, thought leadership presentations, including four esteemed keynote speakers: Lt. Col. Waldo Waldman, Air Force fighter pilot, motivational speaker and author; Dr. Kevin Elko, author and motivational speaker; AmyK Hutchens, speaker, author, coach and master communicator; and Ed Slott, CPA, America’s IRA Expert, and president and founder of Ed Slott and Company, LLC. AP CEO Lon T. Dolber also gave his annual State of the Firm address, during which he shared his thoughts on the financial services industry, provided an overview of what AP has accomplished over the last year and an outlook on what’s ahead for the independent broker/dealer.



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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. Connections 2020 placed strong focus on the recent rollouts and launches of several new and exciting technology initiatives, as well as enhancements to existing proprietary technology, including: 1) a strategic new partnership with SMARtX Advisory Solutions to integrate major enhancements to the American Portfolios (AP) Advisory Platform, whereby the firm's affiliated investment professionals doing advisory business are provided with a single interface in which to access and manage third-party managed and/or rep-directed accounts; 2) the expansion of AP's Unified Managed Account (UMA) program—Unified Solutions, on the AP Advisory 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; 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) Advisor Dashboard, a tailor-made analytics dashboard for a financial advisor's book of business—built by AP advisors, for AP advisors; and 5) Virtual Administrative Services, winner of a 2020 WealthManagement.com Industry Award for its subscription-based offering, enabling advisors to gain remote access to AP team members for providing administrative assistance.

During the conference, attendees navigated from the Theater, where all presentations were held, to various lounges including the AP Resources Lounge and Help Desk. In these areas, attendees were able to interface with AP staff members who demonstrated and answered questions on many offerings essential in the day-to-day operations of its affiliated colleagues and their associated staff in the field. In the Vendor and Networking Lounges, visitors chatted in real-time with AP's many esteemed focus partners and took some time to network with their peers. The Social Responsibility Suite housed multi-media offerings tied to the firm's Corporate Social Responsibility initiatives, including World T.E.A.M., who hosted three raffles for guests to enter, The Center for Discovery, Virtual Enterprises International, Inc., LIFE Arts, Inc. and The Butterfly Effect Project.

In lieu of the annual awards banquet, Connections 2020 recognized the firm's Top Producers through surprise appearances from celebrities who provided pre-recorded congratulatory messages that aired before and after keynote presentations. Celebrity guests included: Shark Tank's Kevin O'Leary; comedian Gilbert Gottfried; top chef Rick Bayless; the NY Jets' C.J. Mosely; famed footballer Daniel "Rudy" Ruettiger; Pittsburgh Steelers great and co-host of Fox NFL Sunday Terry Bradshaw; and Twisted Sister's Dee Snider. Connections 2020 also provided some downtime to interact with colleagues, including a Virtual Happy Hour featuring a performance of That Motown Band, of which Dolber is a member, with guests Garfield Fleming of The Delfonics and guitarist extraordinaire Johnny Gale. In addition, attendees were treated to a Virtual Cooking Class sponsored by Brighthouse Financial.



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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 supports 856 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.*

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