



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

FOR IMMEDIATE RELEASE, CONTACT:
Melissa Grappone, VP of Mktg. & Corp. Comm.
PHONE: 631.439.4600, ext. 108
E-MAIL: mgrappone@americanportfolios.com

American Portfolios Sponsors and Provides Thought Leadership to Annual Financial Planning Association Symposium

HOLBROOK, N.Y. (Nov. 24, 2020)—American Portfolios Financial Services, Inc. (AP)—a privately-held, independent broker/dealer that services financial advisors across the country—recently sponsored the Financial Planning Association of Long Island's (FPA-LI) 2020 Virtual Symposium, also providing thought leadership in the area of information security and multi-media support for the event programming.

The FPA-LI 2020 Virtual Symposium, “Surviving and Thriving in Times of Crisis: The New Normal,” provided Long Island investment professionals the opportunity to learn from top minds; engage in peer-to-peer learning and discussions; and come together to engage in important conversations for the financial services industry. The three-day virtual event featured nationally acclaimed, leading speakers in financial planning discussing the latest developments that impact and enhance our profession.

Among those speakers was AP Chief Information Security Officer Steve Krameisen, who presented “An Investment Professional’s Guide to Information Security.” Krameisen’s well-received session focused on what is meant by the term “information security” and why all investment professionals should care. The presentation covered specific areas that every financial services business should be protecting and how to best manage the risks. “The FPA-LI supports its members in advancing their careers to help clients achieve their financial goals,” said Krameisen. “I was very excited to help with that mission by sharing the importance of information security and the need to protect the clients’ confidential information along the journey. From my perspective, as an attendee and speaker, FPA-LI’s event program was impressive and thought provoking.”

Donna LaScala, RFC, CDFA, CLTC, of Port Washington, N.Y., is an FPA-LI board member who serves as the organization’s Women in Finance Committee co-chair, as well as the Symposium co-chair. LaScala, who has been affiliated with AP for a decade, said “the Symposium Committee’s goal was to make the meeting compelling, informative and entertaining. We went out and got the best speakers to present timely topics; in-between and following sessions we offered multi-media presentations [produced by AP’s media production facility, Studio 454] that included video recordings of committee chair-people, video clips and music interspersed with informative slides for our audience. All in all, it was very well received; our membership recognized and appreciated the work that went into bringing them this year’s FPA-LI Symposium.”

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 862 independent investment professionals—inclusive of registered assistants—and more than 375 non-registered associates, located in 405 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, 2019 and 2020 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 Steve Krameisen

Throughout his more than 35-year career in the financial services industry, Steve Krameisen has held senior management and executive level technology positions at Fortune 50 companies and leading corporations, including: MetLife Broker/Dealer Group, First Allied Securities, Cetera Financial Group, People’s United Bank, Gerstein Fisher and Nathan & Lewis Securities. In 2015, he formed Wealth Tech Consulting, LLC, an information technology consultancy geared specifically for the financial services industry. He now serves as chief information security officer for American Portfolios. Krameisen earned his Bachelor of Science from the State University of New York (SUNY) at Oswego, followed by enrollment in a Master of Science program at Baruch College, with a focus in computer methodology theory and technique. Krameisen, a member of the Financial Services Institute (FSI), is a past speaker at FSI events, as well as at Securities Industry and Financial Markets Association (SIFMA) conferences.

About Donna La Scala, RFC, CDFA, CLTC

Donna LaScala is an affiliated financial advisor with American Portfolios Financial Services, Inc. LaScala has been in the financial services profession for over 25 years working for such firms as E. F. Hutton, Shearson Lehman, American General Financial Services and AXA Advisors. She holds the professional designations of Registered Financial Consultant (RFC) with IARFC Ethics Approved Status, Certified Divorce Financial Analyst (CDFA) and Certified in Long-Term Care (CLTC). LaScala received her CDFA designation, has extensive training as a mediator, is a member of the New York State Council on Divorce Mediation, is trained as a Collaborative Financial Neutral and is a member of Long Island Collaborative Divorce Professionals (LICDP). In this capacity, she assists in the valuation of assets during separation and divorce proceedings, including retirement accounts, personal accounts and closely-held small businesses. Over the course of her career, LaScala has achieved a number of distinctions and received various awards.



About FPA-LI

The Financial Planning Association of Long Island (FPA-LI) is a chapter of the membership organization and professional home for committed practitioners who want to master the practice of financial planning and help shape the future of the profession. The Financial Planning Association (FPA) is comprised of a community of financial professionals committed to advancing the financial planning process in order to help people achieve their goals and dreams.

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