

June 10, 2021

It is hard to believe 20 years have passed since a group of us—like-minded in spirit—came together to fulfill a common vision—the belief in creating not just a company, but rather a place filled with innovative and inspired thinking to provide financial service solutions that could better serve the needs of investment professionals and their clients in private practice. That place was—and is—American Portfolios (AP).

2021 commemorates 20 years since American Portfolios Financial Services, Inc. (APFS) opened its doors as a privately-held, full-service independent broker/dealer. For AP, it would be the first in a succession of many bold business development and expansionary moves to come. We would face challenges along the way, but always to be followed by the celebration of many successes earned.

Looking back, I am proud to say the dream we had for ourselves back in 2001 is not much different than what we are aspiring to today:

...advancing consistently, year-over-year, in our technology, products, advisory and practice management platforms to support existing and affiliating colleagues in the field;

...investing in and nurturing teams of talent equipped to achieve the highest levels of service and process excellence; and

...acting purposefully toward something greater than ourselves as good corporate citizens by giving back to the communities in which we live, work and conduct business.

Our goal over the course of these 20 years has been to help people fulfill their American dreams ... begetting one dream after another and another. I take great pride in what we have achieved and am grateful to each and every one of our valued stakeholders for 20 remarkable years, building a great company that was meant to last.

Together, we look forward to many more years helping make American Dreams possible for everyone.

Sincerely,



Lon T. Dolber
CEO, CIO and President
American Portfolios Financial Services, Inc.
American Portfolios Holdings, Inc.