



AMERICAN PORTFOLIOS FINANCIAL SERVICES, INC.
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American Portfolios Named a Top Long Island Workplace for 2021

The Holbrook-based financial services firm has been ranked the No. 5 Best Small Business in the annual recognition program that honors Long Island, New York companies for their commitment to workplace excellence.

HOLBROOK, N.Y. (Sept. 21, 2021)—American Portfolios Financial Services, Inc. (AP)—a privately-held, independent broker/dealer that provides services and support for financial advisors across the United States—was ranked as the No. 5 Best Small Business in the Top Long Island Workplaces for 2021 by Schneps Media and Energage. 2021 marks the fourth consecutive year AP has been recognized through this awards program.

“On behalf of everyone at American Portfolios, I am delighted to receive this wonderful recognition from the Top Workplaces program, Energage and Schneps Media,” states Vice President of Human Resources Lisa DiBella. “We are especially pleased to receive this honor as we celebrate AP’s 20th year in service as a Long Island-based, privately owned independent broker/dealer.” Chief Administrative Officer Dalchand Laljit echoes DiBella’s sentiments. “It is indeed an honor to be recognized four years in a row where our employees are valued and, in turn, feel a shared responsibility in the firm’s success. Within the organization lies a strong performance culture where team members set development goals for themselves, leading to happy staff followed by happy customers.”

Schneps Media (publisher of Long Island Press, Dan’s Papers and Noticia) partnered with Energage, the research company responsible for conducting Top Workplaces surveys. The recognition program, which was previously operated by Newsday, has been running for four years on Long Island. Results are derived from a confidential, 24-question employee engagement survey administered by Energage.

Survey questions were primarily focused on a company’s response and handling of operations during the coronavirus (COVID-19) pandemic. Deemed an essential business during the pandemic, AP ensured its employees were afforded a safe and supportive work environment. The firm’s quick response to the pandemic enabled the transition of 95% of its employees to remote working environments to safeguard their well-being; the 5% who remained at AP headquarters to handle vital on-site processes were subject to strict safety protocols aligned with state and federal requirements. AP promised all home office employees would not face financial hardship in the face of the pandemic. Despite the economic uncertainty, AP staff members still received yearly bonuses and merit increases.

AP’s unique and engaging corporate culture is at the heart of the firm’s success. AP CEO and President Lon T. Dolber’s business philosophy is firmly rooted in the tenets of stakeholder capitalism, owing to a belief that a company has an obligation to justly serve the interests of all stakeholders: customers, employees, shareholders and the community. In 2021, AP’s executive and senior management teams led a home office initiative that required all AP staff members to take



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part in group discussions of “The Infinite Game” by Simon Sinek. The book’s concepts sparked a healthy debate, enabling AP to build upon its mission statement to establish a Just Cause—“American Portfolios seeks financial pathways for people in pursuit of their American Dreams.”

AP’s 100-plus staff members serve approximately 850 independent investment professionals—inclusive of registered assistants—and more than 396 non-registered associates located in over 400 branch offices throughout the country. Employees are aligned with the company’s strategic roadmap for sustainable growth, which is built on six equally important, interconnected company perspectives—People, Innovation, Process, Customer, Financial and Community—and the foundation from which all planning and executions are derived.

With each incremental advance in growth, AP looks to enhance its total rewards program, whereby employees receive a robust benefits package, including health insurance, free life insurance, unprecedented 401(k) matching, stock options, bonus incentives, merit increases, and performance and service awards. The firm is highly invested in furthering the education of its employees through offering tuition reimbursement, free license testing, and unlimited training seminars and courses. AP also provides Six Sigma (yellow belt) training and strong customer service guidance to help staff hone the “Voice of the Customer,” resulting in their ability to consistently exceed client needs and expectations. The firm has also enacted an employee mentorship program that is designed to groom AP’s emerging business leaders. AP recognizes the importance of work-life balance by offering employees a flexible work schedule, early dismissal on Fridays, a casual dress code and multiple appreciation events. Employees also receive full pay for up to 12 weeks of leave while out on FMLA in order to maintain financial stability.

As an integral part of its strategic focus, ingrained in its corporate culture is a keen awareness to the community by taking part in many socially responsible programs through its non-profit organization (NPO), American Portfolios Foundation, Inc., namely its ongoing association with other NPOs, including World T.E.A.M., The Center for Discovery, Virtual Enterprises International, Inc., Life Arts, Inc., The Butterfly Effect Project, The Westhampton Beach Performing Arts Center, Long Island Cares and Honor Flight Long Island, to name a few.

This achievement stands among AP’s other industry-, peer- and employee-driven recognitions, including Best Companies to Work for in New York State (2016-2021), Long Island Business News’ Corporate Citizen of the Year (2021); Investment Advisor magazine’s Broker/Dealer of the Year (2015-2020); WealthManagement.com Industry Award finalist (2018-2021); Wealthies Award winner (2020); and member of the ThinkAdvisor LUMINARIES Class of 2021.

About American Portfolios

Headquartered in Holbrook, New York, 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,



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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 supports independent investment professionals—inclusive of registered assistants and non-registered associates—throughout the nation.

American Portfolios has numerous recognitions by a number of industry publications and organizations. Such acknowledgment includes: multiple Broker-Dealer of the Year* (Division III) wins by Investment Advisor magazine; multiple finalist and award wins by WealthManagement.com Industry Award in multiple categories**; Corporate Citizen of the Year by Long Island Business News; multiple top placements as one of the Best Companies to Work for in the state of New York 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 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 Energage and Top Workplaces

Energage is a purpose-driven technology company that powers Top Workplaces, the premier employer recognition program. Analyzing data from a short, research-based employee survey, Energage identifies people-first Top Workplaces across the country, as well as regionally in partnership with 58 of the nation’s most reputable media outlets. National, quarterly awards recognize Top Workplaces in culture-specific topics important to job seekers, such as Appreciation, Compensation, DE&I, Remote Work, Woman-Led, Work-Life Flexibility, and more. Energage empowers organizations to exceed the competition, evaluate where they stand in the market, and engage with employees.

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