AMERICAN PORTFOLIOS FINANCIAL SERVICES, INC.
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American Portfolios Hosts Connections 2021, a Virtual National Conference

The New York-based independent broker/dealer held its annual national conference online for its affiliated investment professionals; the two-day event featured top names in the financial services industry.

HOLBROOK, N.Y. (Nov. 2, 2021) — American Portfolios Financial Services, Inc. (AP), a privately-held, independent broker/dealer that services financial advisors nationwide, recently hosted Connections 2021—the firm's annual national conference geared to its network of affiliated investment professionals in private practice, valued business partners and members of home office staff. Over the course of the two-day event, attendees gathered through a robust and engaging virtual platform to learn, network and exchange ideas.

"As a business solutions provider, we serve more than 850 affiliated registered investment professionals and their support teams located in over 400 branch offices across the nation," states Vice President of New Business Development and Advisor Relations David Molter. "Hosting Connections 2021 online was a great way for advisors near and far to convene and network with their peers while taking advantage of the value-added agenda packed with practice management ideas and key takeaways." Molter, who heads up the firm's sales and new business development area, adds, "It is our goal to present a content-rich conference, paying close attention to the needs of our investment professionals, so they come away with what they need to achieve success in their practices."

Connections 2021 hosted a variety of keynote presentations, educational breakout sessions and live demonstrations. Several events held during the virtual conference were streamed live from AP's home office and its media production facility, Studio 454. AP's home office staff were on hand to manage on-site operations, conference coordination and implementation particulars.

While at Connections 2021, attendees enjoyed presentations from three esteemed keynote speakers: Nancy Giordano, strategic futurist (playbiginc), led a compelling discussion on "The Forces Shaping the Enterprises of the Future"; Senior Economist Ben Ayers (Nationwide) provided an "Economic Outlook" in a presentation sponsored by Nationwide; and Steve Harvill, president (Creative Ventures), presented "The Bulls Eye Formula" in a presentation sponsored by Allianz. AP CEO and President Lon T. Dolber also gave his annual State of the Firm address, joined by Chief Administrative Officer Dalchand Laljit and Chief Financial Officer Damon Joyner. During the address, the executive team shared their 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 in this, its twentieth year in operation.

Through AP's continued commitment to platform and technology independence and increased focus on scalability, 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, sustainable practice and plan the best financial futures for their clients. Connections 2021 featured: 1) the Branch Risk Information Security Know-How (BRISK) Program, which focuses on managing branch

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risk through a combination of information security programs and processes intended to provide education and awareness to all AP branches with the objective to improve security posture and provide documented evidence of an established information security program to the firm and regulators for every AP branch; 2) the announcement of a new, fully integrated marketing platform powered by FMG Suite that is designed to help financial advisors deepen client relationships, attract new clients and grow their businesses (a press release is forthcoming); 3) an introduction to the soon-to-be launched Nine Points Investment Management (NPIM) Retirement Plan in partnership with Pershing, LLC, and July Business Services (a press release is forthcoming); 4) demonstrations surrounding AP's "Going Paperless" initiative through live trainings of the firm's client portal, American Portfolios Client Access, through which investors have self-service capability and can register themselves for online account access; 5) valuable breakout sessions covering a wide range of topics pertinent to day-to-day operations, including practice management, retirement planning, and markets and investments; and 6) networking opportunities and panel discussions facilitated by the AP Advisor Council, the firm's advisor advocacy group.

During the virtual conference, attendees navigated from the Theater, where all presentations were held, to various rooms. In these areas, attendees were able to interface with AP staff members who demonstrated and answered questions on many essential offerings to affiliated colleagues and their associated staff in the field. In the Exhibit Hall, visitors chatted in real-time with AP's many esteemed focus partners and networked with their peers. Two new lounges were added for Connections 2021, the Practice Management and Training Lounge and the Sales and Investments Lounge, which offered valuable content across a number of top-of-mind categories from AP's home office and business partners. Lastly, the Social Responsibility Suite connected visitors to the firm's Corporate Social Responsibility (CSR) initiatives, including World T.E.A.M., The Center for Discovery, Virtual Enterprises International, Inc., LIFE Arts, Inc. and The Butterfly Effect Project.

AP looks forward to hosting it's first in-person national conference since 2019; Connections 2022 will be held May 18 – 20 at Mohegan Sun in Uncasville, Connecticut.

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, 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.

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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 .

** 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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