



AMERICAN PORTFOLIOS FINANCIAL SERVICES, INC.  
4250 VETERANS MEMORIAL HWY. | SUITE 420E  
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## **American Portfolios—with Affiliated Financial Advisor and UCP-LI Board Member Edward Levine—Sponsor Charity Event to Benefit Children and Adults with Developmental Disabilities**

The New York-based financial services firm and affiliated colleague Edward Levine proudly support United Cerebral Palsy of Long Island’s mission to provide life skills training, education, advocacy, meaningful employment and a place to call home for Long Islanders with a wide range of disabilities.

HOLBROOK, N.Y. (Nov. 9, 2021) — American Portfolios Financial Services, Inc. (AP), a privately-held, independent broker/dealer that provides services and support to financial advisors throughout the country, was proud to join in and celebrate with Long Island businesses and families as an Empowerment Sponsor for the United Cerebral Palsy of Long Island (UCP-LI) Life Without Limits Gala—a cause the firm supports through its non-profit organization (NPO), the American Portfolios Foundation. UCP-LI’s mission to fulfill dreams and restore hope for individuals with disabilities was adopted by AP through its relationship with affiliated financial advisor Edward Levine (American Portfolios Financial Services, Inc. / Pinnacle Taxx Advisors; Hauppauge, N.Y.), who serves as a UCP-LI board member.

“American Portfolios is proud to support UCP-LI and its mission to create ‘Life Without Limits’ for children and adults with disabilities, helping them lead independent and fulfilling lives,” states AP CEO Lon T. Dolber. “Our commitment to Corporate Social Responsibility (CSR) is firmly ensconced in the belief that the things that make you richest are the things you do for others.”

“As a parent of a daughter with special needs, my advice to other parents and members of the community is to get involved—and that can be at any level. I’m a firm believer in the philosophy that it’s not important what you do, but it’s very important that you do something,” states Levine. Dolber adds, “Ed and his family have been loyal and dedicated proponents of AP’s CSR platform, participating and fundraising for a multitude of events benefitting NPOs to provide enriching experiences that result in personal empowerment for people with complex intellectual and developmental challenges. We are proud to support Ed and his family in their steadfast commitment to support UCP-LI.”

The Levine’s story is shared in this moving [UCP-LI testimonial video](#).

About four years ago, Levine organized a Motown Meets Chicago event through Preemo Productions, a music production company he founded that works with tribute bands across Long Island. A portion of the event’s proceeds were donated to UCP-LI. It was at the concert where Dolber, who performed that evening with That Motown Band, first learned about UCP-LI. Explains Levine, “Lon being Lon asked, ‘What is UCP about and how can I help?’ Since that time, AP has been a regular sponsor.”

On Oct. 14, members of AP’s home office staff attended UCP-LI’s Life Without Limits Gala, which was held at Oheka Castle in Huntington, New York. There, they showed their support for the NPO’s mission and cheered on Amanda Levine, daughter of Levine, who is a member of UCP-LI’s Adult Day Program. Amanda Levine takes part in the Brushstrokes



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Program (an educational fine arts workshop) and, as the gala's featured artist, earned the honor of having her painting, "A Beacon of Light After the Storm," appear on the event invitation and [E-Journal cover](#). Artists in the Brushstrokes Program also contributed their work to the 2021 Gala Silent Auction. AP purchased Amanda Levine's aforementioned work as the highest auction bidder; the painting will hang in the firm's Holbrook, New York, headquarters.

Spanning more than 70 years in service to the community, UCP-LI has grown to provide a wide variety of programs and services for individuals with a wide range of developmental disabilities; AP is honored to offer its support of this exceptional non-profit organization.

### **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.

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](#).

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 the 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.

*\* 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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### **About United Cerebral Palsy of Long Island (UCP-LI)**

Since 1950, UCP-LI has positively impacted the lives of people with disabilities through the outstanding quality of its programs and services and the compassion it conveys to those with whom it serves. UCP-LI is committed to advancing the independence, productivity and full citizenship of people with disabilities by creating “Life Without Limits.” Among its programs are UCP-LI’s Children’s Center, comprised of a team of professionals who offer students innovative early intervention, preschool and school age programs; its Adult Day Programs, which aid in developing individuals’ interests in art, music, sign language, volunteerism and more; and the Residential Program, providing services and care to 225-plus adults and children in 31 residential homes that are beautifully maintained and offer 24-hour support to address the needs of each resident. As a result of these programs and services—coupled with its commitment to uphold the values of excellence, integrity, dignity, empowerment, responsibility, accountability, vision and innovation—individuals with disabilities are living independently and gainfully within their communities. For information on UCP-LI programs and services, please visit [www.ucp-li.org](http://www.ucp-li.org).

### **About Edward Levine**

Edward Levine is the founder and partner of Pinnacle Tax Advisors (Hauppauge, N.Y.), which specializes in tax preparation services and personal financial planning strategies to help create and attain wealth. Levine is also a General Securities Principal affiliated with American Portfolios Financial Services, Inc. (Hauppauge, N.Y.), allowing him great access and flexibility to achieve success for his clients. Levine studied economics and business at the State University of New York College of Oneonta; he holds FINRA Series 7, 24 and 51 licenses. Additionally, Levine is the owner of Preemo Productions, a music production company that works with tribute bands throughout Long Island, New York, to recreate the music of legendary rock ‘n’ roll artists. Levine is active in the community for the physically challenged, having participated in The Empire State Games and The Special Olympics. He sits on the executive council for Care Design NY and is a UCP-LI board member.

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