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American Portfolios Sponsors FPA-LI's 2021 "Facing the Future Together" Virtual Symposium

The New York-based independent broker/dealer serves as sponsor, lending thought leadership, to the Long Island chapter of the Financial Planning Association's annual meeting.

HOLBROOK, N.Y. (Nov. 10, 2021) — 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) 2021 Virtual Symposium, a three-day event that featured nationally acclaimed speakers in the financial planning profession who discussed important topics centered on a theme of "Facing the Future Together."

"American Portfolios is proud to support FPA-LI, encouraging affiliated investment professionals whenever possible to take advantage of the valuable resources this local organization provides," states Senior Vice President of Marketing and Corporate Communications Melissa Grappone. AP served as this year's symposium lunch sponsor, during which the independent broker/dealer provided its unique brand of thought leadership via three video presentations that were followed by prompts to download white papers on financial literacy (video), thematic investing (video) and business continuity (video). Continues Vice President of Marketing Strategy Kimberly A. Branch, CFP®, "Helping our financial advisors succeed is the pinnacle of everything we do at American Portfolios. As a symposium sponsor, we felt that providing FPA-LI members with actionable ideas from our subject matter experts was a great way for us to offer insights and resources."

FPA-LI's annual symposium provides a forum for individuals in the financial services profession located across Long Island's Nassau and Suffolk Counties with the opportunity to learn from top minds, as well as to engage in peer-to-peer learning opportunities and discussions. The event, which was held Oct. 26 – 28, brought together key experts and thought leaders to discuss timely topics across many disciplines of financial planning and practice management.

Donna LaScala, RFC, CDFA, CLTC, of Port Washington, New York, is an FPA-LI board member who serves as the organization's Women in Finance Committee chair, as well as the symposium co-chair. LaScala, who has been affiliated with AP for over a decade, says "The Annual Symposium Committee accepted the challenge to once again think outside the box in this virtual environment. This year's agenda included presentations on topics ranging from efficient tax strategies and the hidden costs of divorce to retirement income planning and estate tax changes under the Biden administration. We designed the program to be informative, interactive and entertaining, while always keeping education top of mind."

The FPA-LI 2021 Symposium also introduced another of AP's affiliated financial advisors, Susan Silverman Quigley, CFP®, of Garden City, New York, who recently assumed the role of director of advocacy on the organization's board. Quigley serves as a liaison on behalf of FPA-LI and elected federal, state and local legislators. In her role, she advocates

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for her fellow investment professionals and the investing public, discussing issues such as Reg BI and helping to explain how it will affect not only registered representatives, but the public for whom the legislation is intended to protect.

"We're delighted that two of the firm's valued affiliated colleagues are making a measurable impact as members of the FPA-LI board of directors," states Grappone. "Both Donna and Susan are great assets for the organization and their peers will certainly gain from their vast knowledge of the financial services industry." AP, along with the firm's affiliated investment professionals who are current members, look forward to being a part of future FPA-LI functions.

American Portfolios Thought Leadership – White Papers

- The Financial Advisor's Role in Promoting Financial Literacy
- Thematic Investing: Turning Insights into Alpha
- Creating a Business Continuity Plan

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.

** 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 Donna LaScala, 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 and 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). With her CDFA designation, LaScala 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. She serves as an FPA-LI board member in the roles of director of women in finance and symposium co-chair. Over the course of her career, LaScala has achieved a number of distinctions and received various awards.

About Susan Silverman Quigley, CFP®

Susan Silverman Quigley is an affiliated financial advisor with American Portfolios Financial Services, Inc. Quigley, a practicing Certified Financial Planner™ (CFP®), has been helping clients manage their finances for over 25 years. In addition to being a CFP, she holds FINRA Series 7 and 63 securities licenses and is licensed to sell insurance. Quigley also offers mortgages and taxes as part of her financial planning practice. Among her various honors, she has received a New York State Senate Commendation Award (2020) and a Woman of Distinction Award (2015); she also serves as an FPA-LI board member in the role of director of advocacy.

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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