



AMERICAN PORTFOLIOS FINANCIAL SERVICES, INC.
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American Portfolios Named a Best Company in NYS Seven Years Running

The Long Island-based, independent broker/dealer is once again recognized by New York's leading human resources association as one of the top places of employment in the state.

HOLBROOK, N.Y. (March 21, 2022)—For the seventh consecutive year, American Portfolios Financial Services, Inc. (AP)—a privately-held, independent broker/dealer that services financial advisors across the country—has been selected as one of the Best Companies to Work for in New York State for 2022 by the New York State Society for Human Resources Management (NYS-SHRM) and the Best Companies Group (BCG). On Feb. 28, NYS-SHRM issued a press release announcing the 75 employers honored in its 2022 awards program. AP was included among 23 medium-sized companies located throughout NYS.

“We are truly humbled to be recognized seven years in a row by this prestigious and respected awards program,” states Vice President of Human Resources Lisa DiBella. “This honor speaks volumes in our commitment to provide our employees with a nurturing environment where they feel valued and can grow with the company.” Chief Administrative Officer Dalchand Laljit adds, “This recognition validates AP’s long-held principle to maintain a corporate culture that gives its first consideration to employees, creating an atmosphere of mutual respect and support for one another, whereby team members are acknowledged for their achievements and encouraged to succeed. This, in turn, instills a sense of pride in our people who feel driven to provide the best possible service to our customers—AP’s affiliated investment professionals.”

The annual awards are part of a program that identifies, recognizes and honors the best places of employment in New York, whose corporate practices benefit the state’s businesses, economy and workforce. In 2016, AP was formally recognized by the NYS-SHRM and the BCG in the category of small/medium-sized employers, in which the firm ranked No. 1. The independent broker/dealer once again ranked within the top 10 in 2017, 2018, 2019, 2020 and 2021.

AP’s 100-plus employees work collaboratively to service the business needs of more than 850 independent investment professionals and their affiliated assistants, as well as support staff, located in nearly 400 branch offices throughout the United States. Employees embrace the tenets of the company’s strategic roadmap for sustainable growth, which is built on six equally important, interconnected strategic company perspectives—People, Innovation, Process, Customer, Financial and Community—and the foundation from which all planning and executions are derived.

Deemed an essential business during the COVID-19 pandemic, AP determined to ensure its employees were afforded a safe and supportive work environment. The firm’s quick response to the pandemic saw the transition of 95% of its employees to remote working environments to ensure their well-being; the 5% of employees who remained at AP headquarters to handle vital on-site processes were subject to strict safety protocols aligned with state and federal requirements. AP made a steadfast promise to all employees, stating they 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 is proactive in looking for ways to enhance its total rewards program and benefits package. Robust employee offerings include health insurance, free life insurance, unprecedented 401(k) matching, stock options, bonus incentives, and



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performance and service awards. The firm is highly invested in the educational betterment of its employees, offering tuition reimbursement, free license testing, and unlimited training seminars and courses. The firm has also enacted an employee mentorship program that is designed to groom AP's emerging business leaders. AP also provides Six Sigma training and customer service training modules to assist staff members in firmly establishing and understanding the "Voice of the Customer." These measures have resulted in AP's ability to consistently exceed client needs and expectations. Additionally, the company recognizes the importance of work-life balance by offering employees a flexible hybrid-work schedule, shortened working hours on Fridays throughout the year, a casual dress code, and appreciation events. AP employees also receive full pay for up to 12 weeks of leave while out on FMLA to maintain financial stability.

A special publication from NYS-SHRM and BCG, which will be mailed to over 10,000 businesses, higher education institutions, and human resources professionals and organizations across New York, will profile each of the 75 winning companies. AP looks forward to attending the awards gala at the Hilton Albany, New York, on April 13, during which all winning companies will learn where they rank among their competition.

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 ThinkAdvisor LUMINARIES awards; 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 NYS-SHRM and the BCG

The NYS-SHRM operates as an affiliate of the nation's SHRM, which is the world's largest association devoted to serving the needs of and advancing the interests of the human resources profession. The BCG is an independent firm that manages the Best Places to Work programs on state, regional and national levels worldwide. The process of selection consists of two parts: a questionnaire completed by the employer, which details company policies, practices, benefits and demographics; and an employee engagement and satisfaction survey, which allows employees to rate their employer on a variety of practices, culture and overall fulfillment. The BCG conducts, analyzes and evaluates the surveys to reveal the 70 best companies to work for in the state of New York for the following year.

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