

American Portfolios Sponsors 2022 Financial Planning Association of Long Island Symposium

HOLBROOK, N.Y. (Oct. 31, 2022)—[American Portfolios Financial Services, Inc. \(AP\)](#)—an independent broker/dealer that provides services and support for financial professionals across the United States—supported the 2022 Financial Planning Association of Long Island (FPA LI) Symposium as a gold sponsor. AP was among the symposium’s 10 presenting sponsors, alongside Nationwide, Mortgage Bankers Inc., RMF LLC, Stefans Law Group, APS Pension Services LLC, Jackson National, Harbor Funds, Invesco, Northern Trust and Prudential.

Over the course of the two-day symposium, FPA LI held its first day virtually, followed by a second day in person at the Mansion at Oyster Bay in Oyster Bay, New York. FPA members were exposed to a number of panel discussions and educational sessions covering such topics around: Cannabis Investing and Essentials of Crypto; A Guide to Markets, Legal and Tax Strategies for Properly Paying for Care Using IRAs as Applied to the New SECURE Act for Retirement Accounts; and the Impact of Social Security and Medicare. American Portfolios introduced portfolio manager/partner of Toroso Investments and finance committee member on the NPIM Investment Committee, David Dziekanski, who presented on The Emergence and Future of Thematic Investing.

AP has been a staunch supporter of FPA at both the national and local levels since its inception as a broker/dealer and investment advisory firm in 2001 and 2003, respectively. Vice President of Marketing Strategy Kimberly A. Branch, CFP®, who was present at the symposium, states “It was my pleasure to represent our organization at FPA LI before a group of esteemed colleagues and product and service partners, many with their CFP® designations. As financial practitioners, events like this enable us to come together to elevate our professional development, gain knowledge and best practices, and build long-lasting relationships in an ever-growing ecosystem of advice.”

As the pandemic forced FPA LI to take the symposium online, this year was the first time in two years that the organization was able to host its event in person. After the positive response from the recent mini symposium held in June, the event was appropriately given the tagline: “*We Are Back to Reality.*”

American Portfolios was honored to be a sponsor and supporter in this year’s event, availing itself of its studio production facility, Studio 454, in preparation for the event. AP continues to demonstrate its long-standing and ongoing support of FPA LI.

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 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."*

*** ThinkAdvisor LUMINARIES are selected by a distinguished and diverse panel of judges from across the advice industry, as well by the Investment Advisor editorial team.*

**** 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 FPA and FPA LI

Founded in 1973, The Financial Planning Association (FPA) is the largest membership organization in the United States. It is a community made up of thousands of financial planners who are facing the same day-to-day challenges. Current membership is 22,000.

As mentioned in their mission statement, "FPA's Long Island chapter, through its program meetings and annual symposium, provides an educational and networking forum for professional financial planners so they may provide the highest level of service to their clients." Their most important goal is to help investment professionals and planners be the best they can be. Whether professionals are looking to learn and grow, make lifelong connections through their chapter or build the confidence they need to serve as a client's most trusted counselor and confidant, FPA LI aims to provide guidance and community.

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