

American Portfolios Convenes Group of Firm's Most Accomplished Financial Practitioners to its Crowning Connections Event, ASCEND 2022

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—invited a select group of investment professionals to its preeminent Connections event, ASCEND 2022, which took place Oct. 13-16 in Reykjavik, Iceland.

“This year, we were excited to see the results of a new qualification process for this smaller, more intimate event we’ve been hosting for a number of years now, that takes a holistic approach to leadership and achievement,” said AP CEO and President Lon T. Dolber. “This year’s chosen investment professionals who attended ASCEND 2022 demonstrated mastery of their profession in financial services and business in a variety of areas, from practice management and financial planning to client relations and community engagement. It was a privilege spending time with these consummate financial practitioners and independent business owners who are serving clients and investing consumers so well.”

Evolving from the former Leaders conferences of the past that had a narrower qualification scope, ASCEND takes into account a broader range of proficiencies and achievements whereby any AP investment professional may be eligible to qualify. Assessed in areas from service offerings such as estate planning and charitable giving to technology tools, hosting client events and community engagement, to name just a few, a Rubric-like score convention was applied in selecting the highest-rated professionals to attend ASCEND 2022.

Affiliated colleague and OSJ Kris Tower of Denver, Colorado, says of attending the event, “The ASCEND trip was an exceptional experience in a magical place. To see amazing sights, enjoy Icelandic culture, dine on exquisite cuisine and interact with my most successful peers was wonderful. I’m grateful to the American Portfolios staff and leadership for their effort and generosity in hosting such an exciting adventure.”

While attending ASCEND 2022, attendees sat in on business and educational sessions covering a variety of topics offered through AP’s valued business partners: Susan O’Connor, ChFC, CASL, RICP, regional vice president of annuities for Nationwide Financial Services; Pete Conneely, vice president and senior advisor consultant for Franklin Templeton; Kevin McCarthy, director at Hilton Capital Management; Eric Fracasso, CIMA, senior advisor consultant at Invesco; and Evan Rapoport, founder and CEO of SMARtX Advisory Solutions.

Affiliated investment professional and OSJ Jeff Hartman of iTP Partners, LLC in Ponte Vedra Beach, Florida, says of ASCEND, “This was an amazing trip with amazing people! ASCEND was probably the best conference I have ever attended. From the educational sessions to wonderful peers with whom I shared this incredible experience, ASCEND was unlike any other event.”

Also in attendance were a selection of AP executive and staff members, including those who earned notable recognitions for Employee of the Year. As the pandemic forced all events to move to a virtual space for several years, ASCEND 2022 saw four employees attend as Employee of the Year: Anthony Esposito (2019), MaryAnn Rosolino and Erica Keane (2020), and Jeremy Vela (2021). Says Vela of attending, “My wife and I had a truly incredible experience attending 2022 ASCEND in Iceland. Between snowmobiling on a glacier, catching a glimpse of the Northern Lights and swimming in the Blue Lagoon, we were treated to all the luxuries that Iceland offers. The breathtaking views of faraway glaciers and mountains looked like they were straight out of a painting. I also enjoyed the opportunity to get to know some of my colleagues, advisors and their families on a personal level. I’m grateful for the firm’s recognition and the opportunity to attend this year’s conference.”

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 of 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.*

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