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BLUEMARK ADVISORS

"There are no better insurance professionals than those at BlueMark Advisors. From long term care insurance to every conceivable life insurance variation, they are knowledgeable, creative..."

John T. Fitzgerald, Jr., Nixon Peabody

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Our Team

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Since 1978 BlueMark Advisors (the successor of Optima Financial Group) has grown into one of the leading providers of benefits, insurance and wealth management for business leaders and entrepreneurs.

- Brian Blaustein, Partner
- Norman Blaustein, Partner
- Mark Kluge, CLU®, CAP®, AEP®, Partner
- Dale Pensgen, CFP®, Director of Wealth Management
- Cindy Proano, CFP®

Check the background of these investment professionals on FINRA's Broker Check

Brian Blaustein
Partner
(585) 244-6800
Ext. 129

Brian Blaustein is a partner at BlueMark Advisors where his focus is in the area of assisting individuals, business owners and professionals with their insurance and investment needs. His strategic approach to determining these needs is what sets him apart. The primary goal of his approach is to make the most suitable recommendations to satisfy his client's needs. He achieves this by learning all he can about his clients objectives as well as by working in close collaboration with the other team members of BlueMark Advisers to bring their specialized individual resources to the client relationship. Mr. Blaustein feels that ultimately, no client relationship is successful without the synergy that a team effort can bring to the table. Prior to joining BlueMark Advisors, Brian began his career in the financial and insurance planning business by completing a two year training program sponsored by Phoenix Life Insurance Company. Through that training, Brian gained the fundamental skills, personal growth and vast product knowledge which have served as a foundation for his current partnership at BlueMark Advisors. Brian graduated with honors from Alfred University in 1996, and holds Life, Accident & Health Insurance and FINRA Series 6 & 63 licenses. Brian lives in Brighton with his wife and two sons, and is actively involved in the activities of his two children. www.brianblaustein.com.

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Norman Blaustein is a partner at BlueMark Advisors. Prior to founding BlueMark Advisors, Mr. Blaustein was a partner in the Wealth Transfer Group, LLC focusing on inter-generational wealth transfer planning for business owners and professionals working collaboratively with legal and tax advisors. Mr. Blaustein began his career as a life insurance professional in 1972 serving the affluent clients of several regional bank trust departments and law firms. He is a life member of the Million Dollar Round Table (MDRT). Mr. Blaustein and his wife Judy are actively involved as co-chairs of the Gala at the Jewish Community Center. He is also active as a member of the Endowment Development Committee for The Jewish Home Foundation, the committee for the annual golf tournament for The Boys and Girls Clubs of Rochester and serves as a volunteer with Lifespan of Rochester serving seniors. Mr. Blaustein served on the board of directors of Irondequoit Country Club for several years and is the past President and current board member of The Twilight League of Rochester. Mr. Blaustein graduated from Utica College with a degree in Business Administration. Mr. Blaustein holds his Life, Accident and Health Insurance licenses.

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Norman Blaustein
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Mark Kluge
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Mark Kluge, CLU®, CAP®, AEP® is a Partner at BlueMark Advisors. Prior to founding BlueMark Advisors, Mr. Kluge was a partner in the Wealth Transfer Group, LLC focused on inter-generational wealth transfer planning for business owners and professionals working collaboratively with legal and tax advisors. Prior to the Wealth Transfer Group, Mr. Kluge was President of MK Financial Services, Inc. serving business owners and professionals with insurance planning and employee benefits. During this time, he was endorsed by the Hospital Association of New York State to bring a premium discount program to the physicians with admitting privileges at regional hospitals in Rochester, New York on individual disability income, buy-out and business overhead expense insurance coverage. Mr. Kluge currently serves on the board of the Rochester Area Business Ethics Foundation and is a member of the Estate Planning Council of Rochester, the Society of Financial Services Professionals, the Partnership for Philanthropic Planning, the Planned Giving Council of Upstate New York, the George Eastman Circle at the University of Rochester and the National Eagle Scout Association. Mr. Kluge graduated from Colgate University and received his Chartered Life Underwriter® (CLU®) and Chartered Advisor in Philanthropy® (CAP®) designations from The American College. Mr. Kluge also holds the Accredited Estate Planner® (AEP®) designation from the National Association of Estate Planners & Councils and has his Life, Accident & Health Insurance and FINRA Series 7 & 66 licenses. www.markkluge.com.

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Dale Pensgen is the Director of Wealth Management at BlueMark Advisors. Prior to joining BlueMark Advisors, Mr. Pensgen was a Vice President at JPMorgan Private Wealth Management in Rochester, New York where he gained significant insight into the financial needs of business owners and high net worth individuals. Dale began his career in the financial services industry in 1972 with Chase Manhattan Bank in New York City. Dale relocated to his hometown of Rochester, New York upon accepting a position with Lincoln First Bank in 1973. As Lincoln First Bank evolved into today's JPMorgan Chase Bank, Dale had the privilege of serving businesses of all sizes from small sole proprietorships to large-cap publicly traded corporations. Dale brings to the BlueMark Advisors team a unique understanding of the wealth and estate planning needs of business owners and wealthy individuals. Mr. Pensgen is a member of the Estate Planning Council of Rochester and serves on the Board of Trustees at the First Baptist Church of Rochester, as the Treasurer and on the Board of Directors of the Skating Institute of Rochester and as Vice President and on the Board of Directors of the Genesee Figure Skating Club. Mr. Pensgen graduated from Hartwick College with a degree in Economics, earned his Masters in Business Administration in Accounting from the Rochester Institute of Technology and is a Certified Financial Planner™ (CFP®). Mr. Pensgen has his Life, Accident & Health Insurance and FINRA Series 7 & 66 Licenses.

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Director of Wealth Management
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Cynthia Proano
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Cindy Proano is a professional at BlueMark Advisors where she provides administrative support. Prior to joining BlueMark Advisors, Ms. Proano was a Vice President with JPMorgan Chase Bank, where she held a succession of management positions in the trust, estate and wealth management group during her 22 years with the firm. Before her joining JPMorgan, Ms. Proano was a financial planner with an advisory group in Rochester, specializing in planning for business owners and estate planning. Prior to her career in personal financial planning, Ms. Proano enjoyed a career in corporate finance with a Fortune 500 company, working in strategic planning and in financial planning and analysis for ten years in Stamford, CT and Rochester, NY. Ms. Proano currently serves on the Executive Board of the Seneca Waterways Council of the Boy Scouts of America, honorary Board Member of Visiting Nurse Service of Rochester, and is a member of the Estate Planning Council of Rochester, and the Planned Giving Council of Upstate New York. Ms. Proano earned a B.A. from Case Western Reserve University and an M.B.A. from the University of Connecticut. She earned her Certified Financial Planner™(CFP®) designation from the College for Financial Planning. Ms. Proano holds Life, Accident & Health Insurance and FINRA Series 7 and 66 licenses.

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