

About Keystone

Back in 2015, Mark Wilson, Marlene Dattilo, and our former partner Mike Anastasia formed Keystone Capital Partners Group in hopes of creating an organization that is anything but cookie-cutter. We focus on building financial strategies by design, allowing us to customize plans according to our Client's unique needs. Below you will find the individuals that make up our dream-team. For full member bios, visit our website at www.keystonecpg.com.

OUR TEAM



Marlene Dattilo, CFP, CLTC, CFBS, CEPA
Partner

Marlene@keystonecpg.com
(585) 485-0194 x1501

Favorite Ice Cream Flavor:
Wegman's Sea Salt Carmel Peanut Butter

Contact me for:

- Fee based financial planning & consultation
- Retirement cash flow modeling
- Portfolio allocation & investment advice
- Risk management – insurance reviews
- Advice on a trip to Aruba, my favorite vacation spot



Mark Wilson, CLU, ChFC, CFBS
Partner

Mark@keystonecpg.com
(585) 485-0194 x1500

Favorite Ice Cream Flavor:
Chocolate Almond

Contact me for:

- Financial strategies & planning
- Defining Wealth & Stewardship Management
- Retirement plans for small businesses
- Outdoor activity ideas (Landscaping, golfing, fishing)



Lee Wilson, CPA
Financial Advisor

Lee@keystonecpg.com
(585) 485-0194 x1504

Favorite Ice Cream Flavor:
Chocolate w/ Choc. Sprinkles

Contact me for:

- Adaptive, dynamic & comprehensive financial planning for current & future goals
- Retirement plan & investment management
- Providing confidence & clarity with your financial objective
- Life insurance review & guidance
- Buffalo Bills & tailgating recipes

OUR TEAM



Christian Nikodem
Paraplanner

Christian@keystonecpg.com
(585) 485-0194 x1509

Favorite Ice Cream Flavor:
Mint Chocolate Chip

Contact me for:

- Investment account inquiries, servicing & trading
- 401K plan enrollments & servicing
- Plan updates for our financial & planning software
- Softball and soccer coaching tips



Melanie Barton
Financial Services Executive

Melanie@keystonecpg.com
(585) 485-0194 x1510

Favorite Ice Cream Flavor:
Grasshopper Pie

Contact me for:

- Scheduling review meetings & appointments with Marlene
- Questions regarding your insurance & Investment account applications
- Status of account transfers
- Group life insurance enrollments & servicing
- Recipes to satisfy your sweet tooth



Wendy Coppola
Admin. Assistant/Receptionist

Wendy@keystonecpg.com
(585) 485-0194 x1503

Favorite Ice Cream Flavor:
Coconut Crunch

- Takes pride in providing a friendly and a warm welcome to everyone who steps through our doors
- Committed to providing comprehensive support that goes above and beyond to make the client experience exceptional
- Provides team support that goes beyond the traditional role to ensure the seamless operation of our office and administrative functions
- Handy tips for home improvement & organization



Leslie Barkley
Administrative Support

Leslie@keystonecpg.com
(585) 485-0194

Favorite Ice Cream Flavor:
Mint Chocolate Chip

- Leslie provides part-time support for our administrative staff by helping with overflow activities and administrative duties



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