



## Firm Brochure Supplement (Part 2B of Form ADV)

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LifeMark Securities Corp.

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This brochure supplement provides information about LifeMark Advisors that supplements the LifeMark Securities brochure. That brochure is available on our website ([www.lifemark.com](http://www.lifemark.com)). Please contact Alex Georgiev if you did not receive LifeMark Securities' brochure or if you have any questions about the contents of this supplement. Alex Georgiev (CRD# 5307830) is the Chief Compliance Officer as well as an Investment Advisory Representative of LifeMark Securities.

Additional information about LifeMark employees listed below is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## March 31, 2021

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## Brochure Supplement (Part 2B of Form ADV)

### Business Standards

LifeMark Securities requires that advisors have work experience that demonstrates their aptitude for financial planning and investment management. LifeMark requires that its advisors have Investment Advisory training as well as demonstrable financial services and securities industry experience.

Investment Advisory training is administered through the home office and conducted by the various third-party investment managers used by LifeMark. In addition, LifeMark advisors may also hold specific industry designations. Some examples are: MBA, CFP®, CFA, ChFC, JD, CTFA, EA or CPA.

### Professional Certifications

Employees have earned certifications and credentials that are required to be explained in further detail.

**Certified Financial Planner (CFP):** Certified Financial Planners are licensed by the CFP Board to use the CFP mark. CFP certification requirements:

- Bachelor's degree from an accredited college or university.
- Completion of the financial planning education requirements set by the CFP Board ([www.cfp.net](http://www.cfp.net)).
- Successful completion of the 10-hour CFP® Certification Exam.
- Three-year qualifying full-time work experience.
- Successfully pass the Candidate Fitness Standards and background check.

**Chartered Financial Analyst (CFA):** Chartered Financial Analysts are licensed by the CFA Institute to use the CFA mark. CFA certification requirements:

- Hold a bachelor's degree from an accredited institution or have equivalent education or work experience.
- Successful completion of all three exam levels of the CFA Program.
- Have 48 months of acceptable professional work experience in the investment decision-making process.
- Fulfill society requirements, which vary by society. Unless you are upgrading from affiliate membership, all societies require two sponsor statements as part of each application; these

are submitted online by your sponsors.

- Agree to adhere to and sign the Member's Agreement, a Professional Conduct Statement, and any additional documentation requested by CFA Institute.

**Enrolled Agent (EA):** Enrolled Agents are enrolled by the Internal Revenue Service and authorized to use the EA designation. EA enrollment requirements:

- Successful completion of the three-part IRS Special Enrollment Examination (SEE), or completion of five years of employment by the IRS in a position which regularly interpreted and applied the tax code and its regulations.
- Successfully pass the background check conducted by the IRS.

# ANDREW KALINOWSKI, CFP

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## Background:

- Date of Birth: 7/31/1944
- CRD# 263409

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	1/1985	

## Disciplinary Information:

None.

## Other Business Activities:

Mr. Kalinowski is Chairman of the Board and CEO of LifeMark Securities and Founder and CEO of Upstate Special Risk Services.

## Additional Compensation:

Mr. Kalinowski may receive additional compensation related to his activities as Chairman of LifeMark Securities and Upstate Special Risk Services.

## Supervision:

Mr. Kalinowski is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Kalinowski's work through office interactions as well as remote interactions. He also reviews Mr. Kalinowski's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Bert Goldberg

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## Background:

- Date of Birth: 8/9/1949
- CRD# 725334

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	1/29/07	
BROOKSTONE SECURITIES, INC.	13366	01/2007	01/2007
AIG FINANCIAL ADVISORS, INC.	133763	10/2005	01/2007
SUNAMERICA SECURITIES, INC.	20068	01/2004	10/2005
VERAVEST INVESTMENT ADVISORS, INC.	105796	02/1995	12/2003
ALLMERICA INVESTMENTS, INC.	3960	03/1981	12/2003
ALLMERICA INVESTMENTS, INC.	3960	03/1981	05/2002

## Disciplinary Information:

None.

## Other Business Activities:

Mr. Goldberg is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Goldberg may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Goldberg is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Goldberg's work through office interactions as well as remote interactions. He also reviews Mr. Goldberg's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Todd Jessop

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## Background:

- Date of Birth: 7/7/1963
- CRD# 2390338

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	1/5/07	
CADARET, GRANT & CO., INC.	10641	12/2003	09/2006
SIGNATOR INVESTORS, INC.	468	04/1993	01/2004
JOHN HANCOCK MUTUAL LIFE INSURANCE CO	5181	04/1993	05/1997

## Disciplinary Information:

None.

## Other Business Activities:

Mr. Jessop is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Jessop may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Jessop is supervised by Alex Georgiev, Chief Compliance Officer of LifeMark Securities Corp. He reviews Mr. Jessop's work through office interactions as well as remote interactions. He also reviews Mr. Jessop's activities through our client relationship management system.

Alex georgiev: Phone: 585-424-5672

# Linda Black, ChFC

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## Background:

- Date of Birth: 9/15/1960
- CRD# 4199042

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	12/11/08	
CENTAURUS FINANCIAL, INC.	30833	08/2006	12/2008
USALLIANZ SECURITIES, INC.	40875	05/2000	08/2006

## Disciplinary Information:

None.

## Other Business Activities:

Ms. Black is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Ms. Black may receive additional compensation related to her activities as a Registered Representative of LifeMark Securities.

## Supervision:

Ms. Black is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Ms. Black's work through office interactions as well as remote interactions. He also reviews Ms. Black's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Jeffrey Morrison

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## Background:

- Date of Birth: 2/10/1947
- CRD# 3200399

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	2/18/05	
HORNOR, TOWNSEND & KENT, INC.	4031	12/2001	02/2005
1717 CAPITAL MANAGEMENT COMPANY	4082	09/2000	12/2001
AXA ADVISORS, LLC	6627	01/1999	09/2000
THE EQUITABLE LIFE ASSURANCE SOCIETY	4039	01/1999	01/2000

## Disciplinary Information:

None.

## Other Business Activities:

Mr. Morrison is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Morrison may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Morrison is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Morrison's work through office interactions as well as remote interactions. He also reviews Mr. Morrison's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672



# Richard Pascale

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## Background:

- Date of Birth: 2/16/1958
- CRD# 3221955

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	2/18/05	
HORNOR, TOWNSEND & KENT, INC.	4031	12/2001	02/2005
1717 CAPITAL MANAGEMENT COMPANY	4082	09/2000	12/2001
AXA ADVISORS, LLC	6627	03/1999	09/2000
THE EQUITABLE LIFE ASSURANCE SOCIETY	4039	03/1999	01/2000

## Disciplinary Information:

None.

## Other Business Activities:

Mr. Pascale is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Pascale may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Pascale is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Pascale's work through office interactions as well as remote interactions. He also reviews Mr. Pascale's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Frederic Scarpulla

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## Background:

- Date of Birth: 2/25/1964
- CRD# 2050038

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	02/11/02	
METROPOLITAN LIFE INSURANCE COMPANY	4095	04/23/01	02/15/02
METLIFE SECURITIES INC.	14251	04/23/01	02/15/02
ALLMERICA INVESTMENTS, INC.	3960	04/08/99	04/09/01
LIFEMARK SECURITIES CORP.	16204	02/04/98	04/01/99
MML INVESTORS SERVICES, INC.	10409	03/01/96	02/05/98
AETNA INVESTMENT SERVICES, INC.	34815	11/24/93	04/14/97
AETNA LIFE INSURANCE AND ANNUITY COMPANY	13256	09/27/93	11/24/93
G. R. PHELPS & CO., INC.	173	03/28/90	03/01/96

## Disciplinary Information:

None.

## Other Business Activities:

Mr. Scarpulla is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Scarpulla may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Scarpulla is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Scarpulla's work through office interactions as well as remote interactions. He also reviews Mr. Scarpulla's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Sara Stolberg Berkowicz

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## Background:

- Date of Birth: 03/23/1963
- CRD# 2111889

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP	16204	10/07/2015	
SEIDMAN PRIVATE SECURITIES, LLC	125051	10/01/2007	08/01/2008
LIFEMARK SECURITIES CORP	16204	02/01/2006	10/01/2007
LASALLE ST SECURITIES, LLC	7191	07/01/2004	12/01/2005
WATERSTONE FINANCIAL GROUP, INC.	10078	01/01/2003	12/01/2003
FINANCIAL NETWORK INVESTMENT CORP.	13572	03/01/2002	12/01/2002
AMERICAN EXPRESS FINANCIAL ADVISORS, INC	6363	10/01/1999	01/01/2000
IDS LIFE INSURANCE COMPANY	6321	10/01/1999	01/01/2000
WADDELL & REED, INC.	866	05/01/1991	12/01/1991
DREHER & ASSOCIATES, INC.	8665	01/01/1991	04/01/1991

## Disciplinary Information:

None.

## Other Business Activities:

Ms. Berkowicz is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Ms. Berkowicz may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Ms. Berkowicz is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Ms. Berkowicz's work through office interactions as well as remote interactions. He also reviews Ms. Berkowicz's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Kent Douglas McNary

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## Background:

- Date of Birth: 05/19/1947
- CRD# 330042

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP	16204	06/24/2015	
NY LIFE SECURITIES LLC	5167	09/01/2011	07/01/2013
MML INVESTOR SERVICES, LLC	10409	10/01/2008	08/01/2011
MML INVESTOR SERVICES, LLC	10409	05/01/2001	06/01/2007
SIGNATOR INVESTORS, INC.	468	06/01/1971	05/01/2001
JOHN HANCOCK MUTUAL LIFE INSURANCE	5181	06/01/1971	05/01/1997

## Disciplinary Information:

1 Disclosure.

## Other Business Activities:

Mr. McNary is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. McNary may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. McNary is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. McNary's work through office interactions as well as remote interactions. He also reviews Mr. McNary's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Ronald Joseph Drake

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## Background:

- Date of Birth: 06/09/1971
- CRD# 4658183

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP	16204	08/21/2012	
PFS INVESTMENTS, INC.	101117	07/01/2003	08/01/2012

## Disciplinary Information:

None.

## Other Business Activities:

Mr. Drake is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Drake may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Drake is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Drake's work through office interactions as well as remote interactions. He also reviews Mr. Drake's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# David Ashley Iobst

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## Background:

- Date of Birth: 08/30/1979
- CRD# 3200819

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP	16204	01/04/2017	
STATE FARM VP MANAGEMENT CORP.	43036	02/01/2011	12/01/2016
DIRECTED SERVICES, LLC	21675	11/01/2007	11/01/2010
TOWER SQUARE SECURITIES, INC	833	02/01/2007	11/01/2007
JEFFERSON PILOT SECURITIES CORPORATION	3870	04/01/2004	01/01/2007
PAN-AMERICAN FINANCIAL ADVISERS	15578	12/01/2001	04/01/2004
AMERICAN CAPITAL CORPORATION	16124	03/01/2001	12/01/2001
PRUCO SECURITIES CORPORATION	5685	04/01/1999	05/01/1999

## Disciplinary Information:

1 Disclosure.

## Other Business Activities:

Mr. Iobst is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Iobst may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Iobst is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Iobst's work through office interactions as well as remote interactions. He also reviews Mr. Iobst's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Jon Heddleson

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## Background:

- Date of Birth: 3/28/1978
- CRD# 4487337

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	10/2013	
TRUE WEALTH DESIGN, LLC	143194	10/2012	04/2013
VANTAGE FINANCIAL GROUP, INC.	105950	06/2012	10/2012
WALNUT STREET SECURITIES, INC.	15840	02/2005	10/2012
NEBS FINANCIAL SERVICES, INC.	103874	07/2004	11/2004
AMERICAN EXPRESS FINANCIAL ADVISORS INC.	6363	06/2003	08/2003
IDS LIFE INSURANCE COMPANY	6321	06/2003	08/2003
ING FINANCIAL ADVISERS, LLC	34815	12/2001	02/2003

## Disciplinary Information:

None

## Other Business Activities:

Mr. Heddleson is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Heddleson may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Heddleson is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Heddleson's work through office interactions as well as remote interactions. He also reviews Mr. Heddleson's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Bradley Maikranz

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## Background:

- Date of Birth: 7/12/1970
- CRD# 2816423

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	06/2012	
FORSYTH SECURITIES, INC.	16323	01/2006	06/2012
SIGMA FINANCIAL CORPORATION	14303	04/2005	09/2005
SPC	110692	04/2005	09/2005
FIFTH THIRD SECURITIES, INC.	628	02/2000	03/2005
WEDGEWOOD PARTNERS, INC.	21923	10/1996	02/2000

## Disciplinary Information:

3 Disclosures

## Other Business Activities:

Mr. Maikranz is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Maikranz may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Maikranz is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr Maikranz's work through office interactions as well as remote interactions. He also reviews Mr. Maikranz's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672



# Vincent Micciche

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## Background:

- Date of Birth: 03/18/1954
- CRD# 702149

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
<a href="#">LIFEMARK SECURITIES CORP.</a>	<a href="#">16204</a>	06/1985	

## Disciplinary Information:

None

## Other Business Activities:

Mr. Micciche is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Micciche may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Micciche is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Micciche's work through office interactions as well as remote interactions. He also reviews Mr. Micciche's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Bruce Moar

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## Background:

- Date of Birth: 07/16/1952
- CRD# 705153

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	06/2007	
BROKERSXPRESS LLC	127081	08/2006	06/2007
CHARLES SCHWAB & CO., INC.	5393	06/2002	09/2004
QUICK & REILLY, INC.	11217	03/1983	06/2002

## Disciplinary Information:

None

## Other Business Activities:

Mr. Moar is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Moar may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Moar is supervised by Alex Georgiev, Chief Compliance Officer of LifeMark Securities Corp. He reviews Mr. Moar's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Lamont Parker

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## Background:

- Date of Birth: 5/25/1967
- CRD# 2946241

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	06/2011	
BROOKSTONE SECURITIES, INC.	13366	04/2007	06/2011
FIRST MIDWEST SECURITIES, INC.	21786	08/2005	04/2007
RAYMOND JAMES & ASSOCIATES, INC.	705	03/2003	06/2005
MORGAN STANLEY DW INC.	7556	03/1998	03/2003
AMERICAN EXPRESS FINANCIAL ADVISORS INC.	6363	09/1997	07/1998
IDS LIFE INSURANCE COMPANY	6321	09/1997	07/1998
OLDE DISCOUNT CORPORATION	5979	12/1997	01/1998

## Disciplinary Information:

6 Disclosures

## Other Business Activities:

Mr. Parker is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Parker may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Parker is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Parker's work through office interactions as well as remote interactions. He also reviews Mr. Parker's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# James Prisco

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## Background:

- Date of Birth: 03/31/1970
- CRD# 2653402

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	10/2001	
CONTINENTAL BROKER-DEALER CORP.	14048	08/1995	07/1996

## Disciplinary Information:

None

## Other Business Activities:

Mr. Prisco is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Prisco may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Prisco is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Prisco's work through office interactions as well as remote interactions. He also reviews Mr. Prisco's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Samuel E Barber

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## Background:

- Date of Birth: 12/11/1980
- CRD# 4750380

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	05/12/2017	
MML INVESTORS SERVICES	10409	08/2009	04/2017
AXA ADVISORS, LLC.	6627	05/2008	04/2009
AXA DISTRIBUTORS, LLC.	25900	08/2005	05/2008
NORTHWESTERN MUTUAL INVESTMENTS SERVICES, LLC	2881	04/2004	08/2005

## Disciplinary Information:

1 DISCLOSURE

## Other Business Activities:

Mr. Barber is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Barber may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Barber is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Barber's work through office interactions as well as remote interactions. He also reviews Mr. Barber's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Ronald Ciotoli

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## Background:

- Date of Birth: 01/01/1970
- CRD# 2293273

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	01/31/2016	
MML INVESTORS SERVICES	10409	09/2000	01/2016
LIBERTY SECURITIES CORPORATION	14416	04/1994	03/2000
PRUCO SECURITIES COROPORATION	5685	11/1992	10/1993

## Disciplinary Information:

1 DISCLOSURE

## Other Business Activities:

Mr. Ciotoli is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Ciotoli may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Ciotoli is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Ciotoli's work through office interactions as well as remote interactions. He also reviews Mr. Ciotoli's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Jeffrey Hanretty

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## Background:

- Date of Birth: 09/22/1959
- CRD# 2635220

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	06/2017	
NATIONAL SECURITIES CORPORATION	7569	05/2016	05/2017
ADIRONDACK TRADING GROUP LLC	103910	05/2012	05/2016
CADARET, GRANT & CO., INC.	10641	06/2000	04/2012
AXA ADVISORS, LLC.	6627	06/1997	06/2000
THE EQUITABLE LIFE ASSURANCE SOCIETY OF THE UNITED STATES	4039	06/1997	01/2000
EQ FINANCIAL CONSULTANTS, INC.	6627	04/1996	08/1996
THE EQUITABLE LIFE ASSURANCE SOCIETY OF THE UNITED STATES	4039	04/1996	08/1996
H.D. VEST INVESTMENT SECURITIES, INC.	13686	12/1995	02/1996

## Disciplinary Information:

3 DISCLOSURES

## Other Business Activities:

Mr. Hanretty is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Hanretty may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Hanretty is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Hanretty's work through office interactions as well as remote interactions. He also reviews Mr. Hanretty's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672

# Garret W Moretz

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## Background:

- Date of Birth: 05/23/1971
- CRD# 4086791

## Business Experience:

Firm Name	Firm CRD	Start Date	End Date
LIFEMARK SECURITIES CORP.	16204	05/31/2017	
FIRST HEARTLAND CAPITAL, INC.	32460	12/2009	05/2017
ALLEGiant SECURITIES LLC.	133912	05/2007	12/2009
SYNERGY INVESTMENT GROUP, LLC	46035	06/2001	12/2006
AMERICAN EXPRESS FINANCIAL ADVISORS INC.	6363	01/2000	07/2001
IDS LIFE INSURANCE COMPANY	6321	01/2000	07/2001

## Disciplinary Information:

NONE

## Other Business Activities:

Mr. Moretz is a Registered Representative of LifeMark Securities.

## Additional Compensation:

Mr. Moretz may receive additional compensation related to his activities as a Registered Representative of LifeMark Securities.

## Supervision:

Mr. Moretz is supervised by Alex Georgiev, Chief Compliance Officer. He reviews Mr. Moretz's work through office interactions as well as remote interactions. He also reviews Mr. Moretz's activities through our client relationship management system.

Alex Georgiev: Phone: 585-424-5672



**Robert Phillip Wolf**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Robert Wolf that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about Robert Wolf (CRD # 1219584) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Robert Wolf

LIFEMARK SECURITIES CORP.	CRD#16204	11/01/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	10/2010 - 11/2018
WOODBURY FINANCIAL SERVICES, INC.	CRD#421	04/2005 - 10/2010
AXA ADVISORS, LLC.	CRD#6627	08/2001 – 04/2005

## Item 3 Disciplinary Information

None

## Item 4 Other Business Activities

**Robert Wolf** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Wolf** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Wolf**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Wolf** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Wolf** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Robert Wolf** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Wolf** for insurance related activities. This presents a conflict of interest because **Mr. Wolf** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Wolf's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, Chief Compliance Officer, is responsible for supervising the advisory activities of **Robert Wolf**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**MARK S. WASKOW**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Mark Waskow** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp.'s. brochure or if you have any questions about the contents of this supplement.

Additional information about **Mark Waskow (CRD # 1518572)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### MARK WASKOW

LIFEMARK SECURITIES CORP.	CRD#16204	10/31/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	04/2015 - 11/2018
MML INVESTORS, LLC.	CRD#10409	06/2006 - 05/2013
WALNUT STREET SECURITIES, INC.	CRD#15840	05/1996 - 09/2004

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Mark Waskow** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Waskow** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Waskow**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Waskow** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Waskow** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Mark Waskow** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Waskow** for insurance related activities. This presents a conflict of interest because **Mr. Waskow** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Waskow's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Mark Waskow**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**SHAWN JENNINGS SAMUEL VUOCOLO**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Shawn Vuocolo** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Shawn Vuocolo (CRD # 4781792)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Shawn Vuocolo

LIFEMARK SECURITIES CORP.	CRD#16204	10/30/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	01/2011 - 10/2018
M&T SECURITIES, INC.	CRD#17358	04/2005 - 05/2009
WOODBURY FINANCIAL SERVICES, INC.	CRD#421	10/2004 - 04/2005
ING FINANCIAL PARTNERS, INC.	CRD#2882	04/2004 – 07/2004

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Shawn Vuocolo** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Vuocolo** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Vuocolo**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Vuocolo** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Vuocolo** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Shawn Vuocolo** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Vuocolo** for insurance related activities. This presents a conflict of interest because **Mr. Vuocolo** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.



## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Vuocolo's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Shawn Vuocolo**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**Walter C Reynolds**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Walter Reynolds** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Walter Reynolds (CRD # 4780512)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Walter Reynolds

LIFEMARK SECURITIES CORP.	CRD#16204	10/24/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	08/2013 - 10/2018
HORNER, TOWNSEND & KENT, INC.	CRD#4031	09/2010 - 08/2013
EQUITY SERVICES, INC.	CRD#265	03/2005 – 09/2010

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Walter Reynolds** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Reynolds** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Reynolds**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Reynolds** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Reynolds** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Walter Reynolds** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Reynolds** for insurance related activities. This presents a conflict of interest because **Mr. Reynolds** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Reynold's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Walter Reynolds**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**GERALD JEFFRY PLACHTA**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Gerald (Jay) Plachta** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Gerald (Jay) Plachta (CRD # 2760419)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Gerald (Jay) Plachta

LIFEMARK SECURITIES CORP.	CRD#16204	11/07/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	02/2012 - 11/2018
WOODBURY FINANCIAL SERVICES, INC.	CRD#421	01/2010 – 11/2011
SII INVESTMENTS, INC.	CRD#2225	07/2008 – 02/2010
AIG FINANCIAL ADVISORS, INC.	CRD#133763	10/2005 – 07/2008
SUNAMERICA SECURITIES, INC.	CRD#20068	10/1999 – 10/2005
METLIFE SECURITIES, INC.	CRD#14251	08/1999 – 09/1999
DELTA EQUITY SERVICES CORP	CRD#15650	05/1997 – 07/1999
METLIFE SECURITIES, INC.	CRD#14251	08/1996 – 05/1997

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Gerald (Jay) Plachta** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Plachta** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Plachta**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Plachta** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Plachta** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Gerald (Jay) Plachta** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Plachta** for insurance related activities. This presents a conflict of interest because **Mr. Plachta** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Plachta's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Gerald (Jay) Plachta**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**Michael Pineda**

**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Michael Pineda that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about Michael Pineda (CRD # 2337780) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).



## Item 2 Educational Background and Business Experience

### Michael Pineda

:		
LIFEMARK SECURITIES CORP.	CRD#16204	08/14/2017 - present
PRUCO SECURITIES, LLC.	CRD#5685	06/2016-07/2017
ROYAL ALLIANCE ASSOCIATES	CRD#23131	08/2014-06/2016
METLIFE SECURITIES INC.	CRD#14251	07/2011-08/2014
VALIC FINANCIAL ADVISORS, INC.	CRD#42803	10/2010-07/2011
TRANSAMERICA CAPITAL, INC.	CRD#8217	06/2008-08/2010
LEADER CAPITAL CORP.	CRD#46206	06/2007-09/2007
TRANSAMERICA CAPITAL, INC.	CRD#8217	11/2004-12/2006
OPPENHEIMERFUNDS DISTRIBUTOR, INC.	CRD#7834	10/2001-11/2004
BROWN&COMPANY SECURITIES CORP	CRD#1326	02/1996-05/2001
JOSEPH CHARLES & ASSOC.,INC	CRD#3949	03/1995-11/1995
PARAMOUNT INVESTMENTS INTL.	CRD#30898	06/1993-01/1994
FOSTER JEFFERIES CO., INC	CRD#30144	04/1993-06/1993

## Item 3 Disciplinary Information

1 Disclosure

## Item 4 Other Business Activities

Michael Pineda is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Pineda may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through Mr. Pineda, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, Mr. Pineda could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Pineda an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Michael Pineda is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. Pineda for insurance related activities. This presents a conflict of interest because Mr. Pineda may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Pineda's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Richard Pascale, Home Office Principal, is responsible for supervising the advisory activities of Michael Pineda. Mr. Pascale can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**DANIEL LEE OBRIEN**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **DANIEL OBRIEN** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **DANIEL OBRIEN (CRD # 1212090)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### DANIEL OBRIEN

LIFEMARK SECURITIES CORP.	CRD#16204	11/01/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	11/1991 - 11/2018
EQUITY SERVICES, INC.	CRD#265	07/1987 - 12/1991
SMA EQUITIES, INC.	CRD#3960	09/1984 - 05/1987
THE BALANCED PROGRAM SECURITIES	CRD#13812	05/1984 – 06/1984

## Item 3 Disclosure Information

One

## Item 4 Other Business Activities

**DANIEL OBRIEN** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. OBRIEN** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. OBRIEN**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. OBRIEN** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. OBRIEN** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**DANIEL OBRIEN** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. OBRIEN** for insurance related activities. This presents a conflict of interest because **Mr. OBRIEN** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. OBRIEN's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **DANIEL OBRIEN**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**Joshua Scott Lipson**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Joshua Lipson that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about Joshua Scott Lipson (CRD # 5703979) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Joshua Scott Lipson

LIFEMARK SECURITIES CORP.	CRD#16204	10/3/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	10/2016 - 10/2018
AXA ADVISORS, LLC.	CRD#6627	08/2012 - 01/2016
SIGNATOR INVESTORS, INC.	CRD#468	01/2011 – 08/2012
SIGNATOR INVESTORS, INC.	CRD#468	09/2009 – 09/2010

## Item 3 Disciplinary Information

One

## Item 4 Other Business Activities

**Joshua Lipson** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Lipson** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Lipson**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Lipson** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Lipson** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Joshua Lipson** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Lipson** for insurance related activities. This presents a conflict of interest because **Mr. Lipson** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Lipson's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Joshua Lipson**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.



**Sandra Renee Lackman**

**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Sandra Renee Lackman that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at

585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about Sandra Renee Lackman (CRD # 2993771) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Sandra Renee Lackman

LIFEMARK SECURITIES CORP.	CRD#16204	10/17/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	02/2011 - 10/2018
CENTAURUS FINANCIAL, INC.	CRD#30833	10/2009 - 12/2010
QA3 FINANCIAL CORP.	CRD#14754	02/2007 - 09/2009
1 <sup>ST</sup> DISCOUNT BROKERAGE, INC.	CRD#39164	03/2005 - 05/2006
TOWER SQUARE SECURITIES, INC.	CRD#833	03/2005 – 05/2006
WALNUT STREET SECURITIES, INC.	CRD#15840	04/2002 – 03/2018
PRUCO SECURITIES CORPORATION	CRD 5685	01/1998 – 04/2002

## Item 3 Disclosures

Two

## Item 4 Other Business Activities

**Sandra Lackman** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Ms. Lackman** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Ms. Lackman**, she will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Ms. Lackman** could be eligible to receive incentive awards such as LifeMark Securities may offer. She may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Ms. Lackman** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Sandra Lackman** is separately licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the

commissions earned by **Ms. Lackman** for insurance related activities. This presents a conflict of interest because **Ms. Lackman** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Ms. Lackman's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Sandra Lackman**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**NANCY M HAIRSINE  
LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Nancy Hairsine** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Nancy Hairsine (CRD # 702783)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Nancy Hairsine

LIFEMARK SECURITIES CORP.	CRD#16204	11/05/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	03/2007 - 11/2018
ROYAL ALLIANCE ASSOCIATES, INC.	CRD#23131	03/2007 - 03/2007
UNITED SECURITIES ALLIANCE, INC.	CRD#36487	01/2001 - 03/2007
T. T. SECURITIES, INC.	CRD#8117	03/1980 – 04/1991
FIVE/THREE SECURITIES CORP.	CRD#6475	12/1979 – 05/1980

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Nancy Hairsine** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Ms. Hairsine** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Ms. Hairsine**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Ms. Hairsine** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Ms. Hairsine** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Nancy Hairsine** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Ms. Hairsine** for insurance related activities. This presents a conflict of interest because **Ms. Hairsine** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Ms. Hairsine's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Nancy Hairsine**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**Alexander S Hackley**

**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Alexander Hackley** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Alexander S Hackley (CRD # 4899317)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Alexander S Hackley

LIFEMARK SECURITIES CORP.	CRD#16204	03/1/2017 - present
SECURITIES AMERICA, INC.	CRD#10205	11/2013 - 02/2017
PRUCO SECURITIES, LLC.	CRD#5685	10/2012 - 04/2013
WOODBURY FINANCIAL SERVICES, INC	CRD#421	01/2005 - 09/2012

## Item 3 Disclosure Information

Three

## Item 4 Other Business Activities

**Alexander Hackley** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Hackley** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Hackley**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Hackley** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Hackley** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Alexander Hackley** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Hackley** for insurance related activities. This presents a conflict of interest because **Mr. Hackley** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.



## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Hackley's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Alexander Hackley**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**Kevin John Hackett**

**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Kevin John Hackett** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about Kevin John Hackett (CRD # 6531214) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Kevin John Hackett

LIFEMARK SECURITIES CORP.	CRD#16204	10/26/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	03/2017 - 10/2018

## Item 3 Disclosures

None

## Item 4 Other Business Activities

**Kevin Hackett** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Hackett** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Hackett**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Hackett** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Hackett** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Kevin Hackett** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Hackett** for insurance related activities. This presents a conflict of interest because **Mr. Hackett** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Hackett's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Kevin Hackett**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**ALEXANDRE GEORGIEV JR**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Alexandre Georgiev Jr** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Alexandre Georgiev Jr (CRD # 5307830)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

**ALEXANDRE GEORGIEV JR**

LIFEMARK SECURITIES CORP.

CRD#16204

07/24/2007 - present

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Alex Georgiev** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Georgiev** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Georgiev**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Georgiev** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Georgiev** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Alex Georgiev** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Georgiev** for insurance related activities. This presents a conflict of interest because **Mr. Georgiev** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Georgiev's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Vincent Micciche, Chief Compliance Officer, is responsible for supervising the advisory activities of **Alex Georgiev**. Mr. Micciche can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**KEITH ALAN GEORGE**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Keith George** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Keith George (CRD # 1970413)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).



## Item 2 Educational Background and Business Experience

### Keith George

LIFEMARK SECURITIES CORP.	CRD#16204	11/06/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	09/2015 - 11/2018
SAGEPOINT FINANCIAL, INC.	CRD#133763	10/2008 - 09/2015
AMERICAN GENERAL SECURITIES, INC.	CRD#13626	03/2004 - 10/2008
SII INVESTMENTS, INC.	CRD#11173	11/2001 – 02/2004
FRANKLIN FINANCIAL SERVICES CORP	CRD#5435	08/1989 – 12/2001

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Keith George** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. George** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. George**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. George** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. George** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Keith George** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. George** for insurance related activities. This presents a conflict of interest because **Mr. George** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. George's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Keith George**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**ROBERT EUGENE FRANK**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Robert Frank** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Robert Frank (CRD # 1455254)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Robert Frank

LIFEMARK SECURITIES CORP.	CRD#16204	10/23/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	08/2013 - 10/2018
HORNOR, TOWNSEND & KENT, INC.	CRD#4031	07/2010 - 08/2013
PARK AVENUE SECURITIES LLC.	CRD#46173	04/2009 - 07/2010
NATIONWIDE SECURITIES, LLC.	CRD#11173	08/2008 – 03/2009
1717 CAPITAL MANAGEMENT	CRD#4082	06/2007 – 08/2008
NATIONWIDE SECURITIES	CRD#11173	11/2001 – 12/2007
ALLAMERICA INVESTMENTS	CRD#3960	10/1992 – 11/2001
PRUCO SECURITIES CORP	CRD5685	04-1986 – 10/1992

## Item 3 Disclosure Information

One

## Item 4 Other Business Activities

**Robert Frank** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Frank** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Frank**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Frank** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Frank** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Robert Frank** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by

**Mr. Frank** for insurance related activities. This presents a conflict of interest because **Mr. Frank** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## **Item 5 Additional Compensation**

Refer to the *Other Business Activities* section above for disclosures on **Mr. Frank's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## **Item 6 Supervision**

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Robert Frank**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**William G. Francis**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about William Francis that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about William Francis (CRD # 4890722) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### William Francis

LIFEMARK SECURITIES CORP.	CRD#16204	01/29/2016 - present
MML INVESTORS SERVICES, LLC.	CRD#10409	07/2011-02/2016
NYLIFE SECURITIES LLC	CRD#5167	02/2005-06/2011

## Item 3 Disciplinary Information

None

## Item 4 Other Business Activities

**William Francis** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Francis** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Francis**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Francis** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Francis** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**William Francis** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Francis** for insurance related activities. This presents a conflict of interest because **Mr. Francis** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Francis's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Richard Pascale, Home Office Principal, is responsible for supervising the advisory activities of **William Francis**. Mr. Pascale can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.



**Patrick C. Durst**

**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Patrick Durst that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about Patrick Durst (CRD # 6328382) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Patrick C. Durst

LIFEMARK SECURITIES CORP.	CRD#16204	07/11/2018 - present
JACKSON NATIONAL LIFE DISTRIBUTORS	CRD#40178	08/2014-06/2018

## Item 3 Disciplinary Information

None

## Item 4 Other Business Activities

**Patrick Durst** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Durst** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Durst**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Durst** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Durst** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Patrick Durst** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Durst** for insurance related activities. This presents a conflict of interest because **Mr. Durst** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Durst's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Richard Pascale, Home Office Principal, is responsible for supervising the advisory activities of **Patrick Durst**. Mr. Pascale can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**JOHN MICHAEL DERBIN JR**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **John Derbin** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **John Derbin (CRD # 3183322)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### John Derbin

LIFEMARK SECURITIES CORP.	CRD#16204	11/05/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	01/2006 - 11/2018
ADVANCE CAPITAL SERVICES, INC.	CRD#19347	07/2004 - 10/2005
BANC ONE SECURITIES CORPORATION	CRD#16999	11/2001 - 06/2004
MORGAN STANLEY DW INC.	CRD#7556	03/1999 – 08/2001

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**John Derbin** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Derbin** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Derbin**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Derbin** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Derbin** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**John Derbin** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Derbin** for insurance related activities. This presents a conflict of interest because **Mr. Derbin** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Derbin's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **John Derbin**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**Anthony James Constantine Jr**

**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Anthony Constantine Jr** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Anthony Constantine Jr (CRD # 2427074)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Anthony Constantine Jr

LIFEMARK SECURITIES CORP.	CRD#16204	11/01/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	01/2011 - 11/2018
WRP INVESTMENTS, INC.	CRD#7365	05/2007 - 12/2010
METLIFE SECURITIES, INC.	CRD#14251	05/2003 - 08/2006
SIGNATOR INVESTORS, INC.	CRD#468	02/1998 – 04/2003
EQUITY SERVICES, INC.	CRD#265	09/1996 – 02/1998
SUN INVESTMENT SERVICES	CRD#5496	12/1993 – 11/1996

## Item 3 Disciplinary Information

None

## Item 4 Other Business Activities

**Anthony Constantine Jr** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Constantine** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Constantine**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Constantine** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Constantine** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Anthony Constantine** is separately licensed as an independent insurance agent. In this capacity, he can affect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Constantine** for insurance related activities. This presents a conflict of interest because **Mr. Constantine** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.



## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Constantine's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, Chief Compliance Officer, is responsible for supervising the advisory activities of **Anthony Constantine**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**Zultan Bermudez**

**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Zultan Bermudez** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Zultan Bermudez (CRD # 5612041)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Zultan Bermudez

LIFEMARK SECURITIES CORP.	CRD#16204	10/30/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	11/2014 - 11/2018
METLIFE SECURITIES, INC.	CRD#14251	12/2008 - 12/2013

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Zultan Bermudez** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Bermudez** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Bermudez**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Bermudez** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Bermudez** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Zultan Bermudez** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Bermudez** for insurance related activities. This presents a conflict of interest because **Mr. Bermudez** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Bermudez's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Zultan Bermudez**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**DAVID IRA BLOCK**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **David Block** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **David Block (CRD # 2318504)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### DAVID BLOCK

LIFEMARK SECURITIES CORP.	CRD#16204	12/15/2017 - present
INVEST FINANCIAL CORP.	CRD#12984	06/2008 – 12/2017
AMERICAN PORTFOLIOS FINANCIAL SERVICES	CRD#18487	01/2002 – 06/2008
TRUSTED SECURITIES ADVISORS CORP.	CRD#24049	01/1995 – 12/2001

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**David Block** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Block** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Block**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Block** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Block** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**David Block** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Block** for insurance related activities. This presents a conflict of interest because **Mr. Block** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Block's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Vincent Micciche is responsible for supervising the advisory activities of **David Block**. Mr. Micciche can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**DEVIN A BORN**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Devin Born** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Devin Born (CRD # 2275635)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).



## Item 2 Educational Background and Business Experience

### DEVIN BORN

LIFEMARK SECURITIES CORP.	CRD#16204	06/16/2016 - present
COMPREHENSIVE ASSET MANAGEMENT	CRD#43814	09/2007- 06/2016
PRIME CAPITAL SERVICES, INC.	CRD#18334	03/2000 – 09/2007
WMA SECURITIES, INC.	CRD#32625	11/1997 – 03/2000
JOHN HANCOCK DISTRIBUTORS, INC.	CRD#468	02/1993 – 10/1997
-		

## Item 3 Disclosure Information

Two

## Item 4 Other Business Activities

**Devin Born** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Born** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Born**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Born** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Born** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Devin Born** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Born** for insurance related activities. This presents a conflict of interest because **Mr. Born** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Born's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Vincent Micciche is responsible for supervising the advisory activities of **Devin Born**. Mr. Micciche can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**JENNA A BROWN**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Jenna Brown** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Jenna A Brown (CRD # 5361782)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### JENNA BROWN

LIFEMARK SECURITIES CORP.	CRD#16204	06/21/2018 - present
CADARET, GRANT & CO., INC.	CRD#10641	08/21/2017 - 02/15/2018
MERRILL LYNCH, PIERCE, FENNER & SMITH INC.	CRD#7691	10/09/2014 – 08/22/2017
LPL FINANCIAL LLC.	CRD#6413	10/03/2012 – 09/25/2014

## Item 3 Disclosure Information

Two

## Item 4 Other Business Activities

**Jenna Brown** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Ms. Brown** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Ms. Brown**, she will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Ms. Brown** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Ms. Brown** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Jenna Brown** is separately licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Ms. Brown** for insurance related activities. This presents a conflict of interest because **Ms. Brown** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Ms. Brown's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Vincent Micciche is responsible for supervising the advisory activities of **Jenna Brown**. Mr. Micciche can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**PATRICK BROWN**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Patrick Brown** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Patrick Brown (CRD # 4385846)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### PATRICK BROWN

LIFEMARK SECURITIES CORP.	CRD#16204	12/04/2018 - present
FORESTERS EQUITY SERVICES, INC	CRD#18464	11/2015 – 10/2018
TRANSAMERICA FINANCIAL ADVISORS, INC	CRD#16164	02/2012 – 09/2015
MML INVESTORS SERVICES, LLC	CRD#10409	06/2011 – 10/2011
TRANSAMERICA FINANCIAL ADVISORS, INC	CRD#16164	09/2009 – 04/2011
TRANSAMERICA FINANCIAL ADVISORS, INC.	CRD#3600	11/2006 – 09/2009
SIGNATOR INVESTORS, INC	CRD#468	07/2003 – 10/2004

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Patrick Brown** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Brown** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Brown**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Brown** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Brown** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Patrick Brown** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Brown** for insurance related activities. This presents a conflict of interest because **Mr. Brown** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no

obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Brown's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Patrick Brown**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.



**JOHN HOWARD BUSEY  
LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **John Busey** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **John Busey (CRD # 2982127)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### John Busey

LIFEMARK SECURITIES CORP.	CRD#16204	08/07/2017 - present
INVEST FINANCIAL SECURITIES	CRD#12984	01//2005 – 05/2017
SUNAMERICA SECURITIES INC.	CRD#20068	01/2002 – 02/2005
FINANCIAL NETWORK INVESTMENT CORP	CRD#13572	12/1997 – 02/2000

## Item 3 Disclosure Information

Ten

## Item 4 Other Business Activities

**John Busey** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Busey** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Busey**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Busey** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Busey** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**John Busey** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Busey** for insurance related activities. This presents a conflict of interest because **Mr. Busey** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Busey's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Vincent Micciche, Chief Compliance Officer, is responsible for supervising the advisory activities of **John Busey**. Mr. Micciche can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**Steven R. Cross**

**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Steven Cross** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Steven Cross (CRD # 1131678)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Steven Cross

LIFEMARK SECURITIES CORP.	CRD#16204	11/14/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	01/2016 - 11/2018
KOVACK SECURITIES, INC.	CRD#444848	10/2014 - 12/2015
RESOURCE HORIZONS GROUP LLC	CRD#104368	02/2013 – 10/2014
NEW ENGLAND SECURITIES	CRD#615	01/1990 – 02/2013
EQUITY SERVICES, INC.	CRD#265	07/1986 – 01/1990

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Steven Cross** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Cross** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Cross**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Cross** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Cross** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Steven Cross** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Cross** for insurance related activities. This presents a conflict of interest because **Mr. Cross** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Cross** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Steven Cross**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**Nicholas Delgaizo**

**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Nicholas Delgaizo** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Nicholas Delgaizo (CRD # 6526259)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

**Nicholas Delgaizo**

LIFEMARK SECURITIES CORP.

CRD#16204

10/02/2017 - present

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Nick Delgaizo** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Delgaizo** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Delgaizo**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Delgaizo** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Delgaizo** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Nick Delgaizo** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Delgaizo** for insurance related activities. This presents a conflict of interest because **Mr. Delgaizo** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.



## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Delgaizo** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Nick Delgaizo**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**ERNEST Q. DENMARK, JR.  
LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Ernest Denmark** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Ernest Denmark (CRD # 2433523)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### ERNEST DENMARK JR

LIFEMARK SECURITIES CORP.	CRD #16204	10/19/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD #18464	02/2012 - 10/2018
AMERITAS INVESTMENT CORP.	CRD #14869	09/2009 – 02/2012
ALLSTATE FINANCIAL SERVICES	CRD #18272	03/2002 – 10/2009
LOCUST STREET SECURITIES	CRD #1703	05/1999 – 11/1999
WASHINGTON SQUARE SECURITIES	CRD#2882	01/1994 – 01/1999

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Ernest Denmark** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Denmark** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Denmark**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Denmark** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Denmark** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Ernest Denmark** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Denmark** for insurance related activities. This presents a conflict of interest because **Mr. Denmark** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Denmark's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Vincent Micciche is responsible for supervising the advisory activities of **Ernest Denmark**. Mr. Micciche can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**Michael Thomas Gilmartin**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Michael Gilmartin** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Michael Gilmartin (CRD # 4975704)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Michael Gilmartin

LIFEMARK SECURITIES CORP.	CRD#16204	01/03/2019 - present
J. W. COLE ADVISORS, INC.	CRD#112294	05/2010 - 01/2019
GUNNALLEN FINANCIAL, INC.	CRD#17609	06/2009 - 03/2010
BB&T INVESTMENT SERVICES, INC.	CRD#33856	05/2007 - 05/2009

## Item 3 Disciplinary Information

None

## Item 4 Other Business Activities

**Michael Gilmartin** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Gilmartin** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Gilmartin**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Gilmartin** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Gilmartin** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Michael Gilmartin** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Gilmartin** for insurance related activities. This presents a conflict of interest because **Mr. Gilmartin** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Gilmartin's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, Chief Compliance Officer, is responsible for supervising the advisory activities of **Michael Gilmartin's**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**DAVID E. HOWARD**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **David Howard** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **David E. Howard (CRD # 1986410)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).



## Item 2 Educational Background and Business Experience

### DAVID HOWARD

LIFEMARK SECURITIES CORP.	CRD#16204	11/28/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	04/2003 - 11/2018
ROBERT B AUSDAL & CO	CRD#79950	001/2002 – 04/2003
RE-DIRECT SECURITIES	CRD#35518	03/1997 – 12/2001
AMERICAN INVESTMENT SERVICES	CRD#21111	07-1993 – 12/1996
WADDELL & REED	CRD#866	11/1991 – 07-1993
THE STUART-JAMES COMPANY	CRD#11691	05/1990 – 08/1990
ALLIANCE SECURITIES	CRD#15468	01/1990 – 01/1990
KETTLER COMPANY	CRD#10530	10/1989 – 12/1989

## Item 3 Disclosure Information

One

## Item 4 Other Business Activities

**David Howard** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Howard** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Howard**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Howard** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Howard** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**David Howard** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by

**Mr. Howard** for insurance related activities. This presents a conflict of interest because **Mr. Howard** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Howard's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Vincent Micciche is responsible for supervising the advisory activities of **David Howard**. Mr. Micciche can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**DANYUI HUANG**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Danyui Huang** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Danyui Huang (CRD # 5076852)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### DANYUI HUANG

LIFEMARK SECURITIES CORP.	CRD#16204	04/30/2019 - present
MML INVESTORS SERVICES, LLC.	CRD#10409	03/2017 - 01/2019
MSI FINANCIAL SERVICES, INC.	CRD#14251	09/2014 - 03/2017
PRUCO SECURITIES, LLC.	CRD#5685	06/2014 - 09/2014
WANG INVESTMENT ASSOC., INC.	CRD#17912	12/2010 - 07/2012
GENESIS SECURITIES, LLC.	CRD# 46992	03/2009 - 12/2010
E1 ASSET MANAGEMENT, INC.	CRD#46872	11/2007 - 09/2008
J.P. TURNER & COMPANY, LLC.	CRD#43177	06/2007 - 11/2007
E1 ASSET MANAGEMENT, INC.	CRD#46872	03/2006 – 01/2007

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Danyui Huang** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Huang** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Huang**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Huang** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Huang** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Danyui Huang** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Huang** for insurance related activities. This presents a conflict of interest because **Mr. Huang** may have an incentive to recommend insurance products to you for the purpose of generating commissions

rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Huang** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Vincent Micciche is responsible for supervising the advisory activities of **Danyui Huang**. Mr. Micciche can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**ROBERT JOHN KOSTY**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Robert J Kosty** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Robert J Kosty (CRD # 1408742)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### ROBERT KOSTY

LIFEMARK SECURITIES CORP.	CRD#16204	10/28/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	07/03/2013 - 10/29/2018
TRUSTMONT ADVISORY GROUP, INC.	CRD#106015	05/08/2009 – 06/25/2013
LINCOLN FINANCIAL SECURITIES CORP.	CRD#3870	01/12/2006 – 03/13/2019

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Robert Kosty** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Kosty** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Kosty**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Kosty** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Kosty** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Robert Kosty** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Kosty** for insurance related activities. This presents a conflict of interest because **Mr. Kosty** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Kosty's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Vincent Micciche is responsible for supervising the advisory activities of **Robert Kosty**. Mr. Micciche can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.



**THOMAS H. LUCKENBILL  
LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Thomas Luckenbill** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Thomas H Luckenbill (CRD # 3054999)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### THOMAS LUCKENBILL

LIFEMARK SECURITIES CORP.	CRD#16204	10/28/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	07/2016 - 11/2018
NEXT FINANCIAL GROUP, INC.	CRD#46214	11/2004 – 07/2016
NY LIFE SECURITIES INC.	CRD#5167	02/2003 – 10/2004

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Thomas Luckenbill** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Luckenbill** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Luckenbill**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Luckenbill** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Luckenbill** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Thomas Luckenbill** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Luckenbill** for insurance related activities. This presents a conflict of interest because **Mr. Luckenbill** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Luckenbill's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Vincent Micciche is responsible for supervising the advisory activities of **Thomas Luckenbill**. Mr. Micciche can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**KEVIN ROCHE JR**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Kevin Roche Jr** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Kevin Roche Jr (CRD # 3271142)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### KEVIN ROCHE JR

LIFEMARK SECURITIES CORP.	CRD#16204	10/18/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	01/2013 – 10/2018
INTERSECURITIES, INC.	CRD#16164	03/2011 – 12/2012
INTERSECURITIES, INC.	CRD#16164	02/2000 – 10/2005
WASHINGTON SQUARE SECURITIES, INC.	CRD#2882	07/1999 – 03/2000

## Item 3 Disclosure Information

Five

## Item 4 Other Business Activities

**Kevin Roche Jr** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Roche** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Roche**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Roche** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Roche** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Kevin Roche Jr** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Roche** for insurance related activities. This presents a conflict of interest because **Mr. Roche** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Roche's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Kevin Roche Jr.** Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**JOSEPH L. FERRY, JR.  
LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Joseph Ferry** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Joseph Ferry (CRD # 2435459)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### JOSEPH FERRY, JR

LIFEMARK SECURITIES CORP.	CRD #16204	01/04/2010 - present
MML INVESTORS SERVICES, INC.	CRD #10409	012/2008 - 12/2009
LIFEMARK SECURITIES, CORP.	CRD #16204	04/1996 – 12/2008
NEW ENGLAND SECURITIES	CRD #615	11/1995 – 05/1996
METLIFE SECURITIES INC.	CRD #14251	01/1994 – 06/1995

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Joseph Ferry** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Ferry** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Ferry**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Ferry** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Ferry** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Joseph Ferry** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Ferry** for insurance related activities. This presents a conflict of interest because **Mr. Ferry** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.



## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Ferry's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Vincent Micciche is responsible for supervising the advisory activities of **Joseph Ferry**. Mr. Micciche can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**BRADLEY ALAN MORRIS**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Bradley Morris** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Bradley Morris (CRD #1040140)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### BRADLEY ALAN MORRIS

LIFEMARK SECURITIES CORP.	CRD#16204	11/15/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	08/2017 – 10/2018
PRUCO SECURITIES, LLC.	CRD#5685	06/2017 – 08/2017
FORESTERS EQUITY SERVICES, INC.	CRD#18464	11/2007 – 06/2017
MML INVESTORS SERVICES, LLC.	CRD#10409	04/2007 – 11/2007
FORESTERS EQUITY SERVICES, INC.	CRD#18464	06/2003 – 01/2007
SIGNAL SECURITIES, INC.	CRD#15916	09/1998 – 04/2002
ROYAL ALLIANCE ASSOCIATES, INC.	CRD#23131	09/1995 – 09/1996
ADVANTAGE CAPITAL CORPORATION	CRD#146	04/1991 – 08/1995
A. G. EDWARDS & SONS, INC.	CRD#4	07/1989 – 04/1991

## Item 3 Disclosure Information

Two

## Item 4 Other Business Activities

**Bradley Alan Morris** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Morris** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Morris**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Morris** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Morris** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Bradley Alan Morris** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Morris** for insurance related activities. This presents a conflict of interest because **Mr. Morris** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are

under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Morris'** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Bradley Alan Morris**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**SAMUEL GEORGE WHITE**  
**LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Samuel George White** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Samuel George White (CRD #4562032)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### SAMUEL GEORGE WHITE

LIFEMARK SECURITIES CORP.	CRD#16204	10/30/2018 - present
FORESTERS EQUITY SERVICES, INC.	CRD#18464	11/2011 – 10/2018
AVANTAX INVESTMENT SERVICES, INC.	CRD#13686	07/2002 – 11/2011

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Samuel George White** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. White** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. White**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. White** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. White** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Samuel George White** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. White** for insurance related activities. This presents a conflict of interest because **Mr. White** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. White's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Samuel George White**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**LAVELLE KENNETH KNIGHT  
LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **LaVelle Kenneth Knight** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **LaVelle Kenneth Knight (CRD #811522)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).



## Item 2 Educational Background and Business Experience

### LAVELLE KENNETH KNIGHT

LIFEMARK SECURITIES CORP.	CRD#16204	09/2020 - present
WOODBURY FINANCIAL SERVICES, INC.	CRD#421	06/2017 – 09/2020

## Item 3 Disclosure Information

Three

## Item 4 Other Business Activities

**LaVelle Kenneth Knight** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Knight** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Knight**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Knight** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Knight** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**LaVelle Kenneth Knight** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Knight** for insurance related activities. This presents a conflict of interest because **Mr. Knight** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Knight's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **LaVelle Kenneth Knight**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**MICHAEL JOSEPH GAROFALO JR.  
LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Michael Joseph Garofalo Jr.** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Michael Joseph Garofalo Jr. (CRD # 2678306)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### MICHAEL JOSEPH GAROFALO JR.

LIFEMARK SECURITIES CORP.	CRD#16204	01/03/2012 - present
ALLSTATE FINANCIAL SERVICES, LLC	CRD#18272	11/2004 – 01/2012
CARILLON INVESTMENTS, INC.	CRD#14646	11/2003 – 11/2004
ALLSTATE FINANCIAL SERVICES, LLC	CRD#18272	07/2002 – 11/2003
FIRST MONTAUK SECURITIES CORP.	CRD#13755	01/2002 – 08/2002
GLATFELTER FINANCIAL SERVICES, INC.	CRD#101980	03/2000 – 01/2002
FIRST MONTAUK SECURITIES CORP.	CRD#13755	01/2000 – 03/2000
CARILLON INVESTMENTS, INC.	CRD#14646	03/1998 – 01/2000
DREYFUS INVESTMENT SERVICES CORPORATION	CRD#17477	09/1996 – 03/1998
DREYFUS INVESTMENT SERVICES CORPORATION	CRD#42430	09/1996 – 03/1998
METROPOLITAN LIFE INSURANCE COMPANY	CRD#4095	09/1995 – 09/1996
METLIFE SECURITIES INC.	CRD#14251	07/1995 – 09/1996

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Michael Joseph Garofalo Jr.** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Garofalo** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Garofalo**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Garofalo** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of

additional compensation may give **Mr. Garofalo** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Michael Joseph Garofalo Jr.** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Garofalo** for insurance related activities. This presents a conflict of interest because **Mr. Garofalo** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Garofalo's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Michael Joseph Garofalo Jr.** Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

**DAVID KRISTOPHER GRIFFITH  
LifeMark Securities Corp.**

**400 West Metro Park  
Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **David Kristopher Griffith** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **David Kristopher Griffith (CRD #3072664)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### DAVID KRISTOPHER GRIFFITH

LIFEMARK SECURITIES CORP.	CRD#16204	05/2015 – present
LEIGH BALDWIN & CO., LLC	CRD#38751	09/2012 – 05/2015
IBN FINANCIAL SERVICES, INC.	CRD#42360	04/2007 – 10/2012
LEIGH BALDWIN & CO., LLC	CRD#38751	11/2006 – 04/2007
M. GRIFFITH LOCKE INVESTEMENT SERVICES INC.	CRD#2078	01/2001 – 08/2006
NORTHWESTERN MUTUAL INVESTEMENT SERVICES, LLC	CRD#2881	02/2000 – 01/2001
ROBERT W. BAIRD & CO. INCORPORATED	CRD#8158	08/2000 – 01/2001
M. GRIFFITH LOCKE INVESTEMENT SERVICES INC.	CRD#2078	05/1998 – 02/2000

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**David Kristopher Griffith** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Griffith** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Griffith**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Griffith** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Griffith** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**David Kristopher Griffith** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for

these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Griffith** for insurance related activities. This presents a conflict of interest because **Mr. Griffith** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## **Item 5 Additional Compensation**

Refer to the *Other Business Activities* section above for disclosures on **Mr. Griffith's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## **Item 6 Supervision**

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **David Kristopher Griffith**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.



**CHARLES DRAKE AGUILLARD**  
**LifeMark Securities Corp.**

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Rochester, NY 14623**

**Telephone: 585-424-5672**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about **Charles Drake Aguillard** that supplements the LifeMark Securities Corp. brochure. You should have received a copy of that brochure. Contact us at 585-424-5672 if you did not receive LifeMark Securities Corp's. brochure or if you have any questions about the contents of this supplement.

Additional information about **Charles Drake Aguillard (CRD #2689932)** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### CHARLES DRAKE AGUILLARD

LIFEMARK SECURITIES CORP.	CRD#16204	06/2012 – present
ALLSTATE FINANCIAL SERVICES, LLC	CRD#18272	11/2009 – 04/2012
VALIC FINANCIAL ADVISORS, INC.	CRD#42803	05/2000 – 09/2009
THE VARIABLE ANNUITY MARKETING COMPANY	CRD#5081	05/2000 – 12/2001
EDWARD JONES	CRD#250	08/1997 – 04/2000

## Item 3 Disclosure Information

None

## Item 4 Other Business Activities

**Charles Drake Aguillard** is a Registered Representative with LifeMark Securities. LifeMark Securities is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, **Mr. Aguillard** may recommend securities or insurance products offered by LifeMark Securities as part of your investment portfolio. If you purchase these products through **Mr. Aguillard**, he will receive the customary commissions in his separate capacity as a registered representative of LifeMark Securities.

Additionally, **Mr. Aguillard** could be eligible to receive incentive awards such as LifeMark Securities may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give **Mr. Aguillard** an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

**Charles Drake Aguillard** is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by **Mr. Aguillard** for insurance related activities. This presents a conflict of interest because **Mr. Aguillard** may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on **Mr. Aguiard's** receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of LifeMark Securities, Corp.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Alex Georgiev, RIA Chief Compliance Officer, is responsible for supervising the advisory activities of **Charles Drake Aguiard**. Mr. Georgiev can be reached at (585) 424-5672.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by LifeMark Securities, Corp., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.