

**FINANCIAL LEADERS**

LONG ISLAND

**Meet the Team that Changes Lives**

Frank Scalese meets with Financial Advisor Claudia Ferreira, CFP®, ChFC®, LUTCF

HOME TO OVER 125 FINANCIAL ADVISORS, BLUE OCEAN WEALTH SOLUTIONS, A MEMBER OF THE MASSMUTUAL FINANCIAL GROUP, IS A HIGHLY RESPECTED AND SUCCESSFUL FIRM THAT SERVES OVER 100,000 BUSINESSES AND FAMILIES. MANAGING PARTNER FRANK SCALESE TALKS ABOUT WHY BLUE OCEAN WEALTH SOLUTIONS IS A PLACE WHERE ADVISORS—AND THEIR CLIENTS—ARE EQUIPPED TO THRIVE.

**How would you describe the culture at Blue Ocean Wealth Solutions?**

Being a Financial Advisor is one of the fastest growing careers today, so we strive to create an environment where people can successfully build a lifetime business. Our diverse, family-oriented culture is a reflection of the clients we serve. We share a passion to change people's lives, but at the same time, we like to have fun. Our office has a ping-pong table and a Wii™ to lighten the mood and create a sense of comradery.

**What resources are offered to help advisors grow their businesses?**

Advisors have access to a full array of products underwritten by MassMutual in addition to other leading companies to find the best solutions for their clients. In addition, they also receive



*Frank Scalese,  
Managing  
Partner of  
Blue Ocean  
Wealth Solutions*

local, in-house support from an Advanced Markets

Director, marketing and training departments, and a staff specializing in operations, compliance, and technology.

Our firm is unique in that our organizational chart is essentially turned upside down. As Managing Partner, I and my leadership team are here to support our advisors as they bring the best in service and solutions to their clients. We work for them.

**How does the firm serve the local community?**

It's our sincere pleasure to be involved with local charities.

Our advisors and staff are involved in community events almost every weekend, supporting causes close to their hearts. As a firm, we are also committed to education and offer seminars to engage people on important financial topics. Our advisors help clients on a daily basis to understand the value of insurance as an innovative financial planning tool that can benefit family legacies and businesses.

**What qualities are you looking for in new team members?**

We welcome both experienced advisors looking to join a more supportive culture as well as newcomers who are looking to build their own business in a lifelong career opportunity. We're seeking people who wholeheartedly uphold our mission of helping to change people's lives in a positive way.

**Blue Ocean Wealth Solutions** has offices in East Hills and Long Island City. To learn more, email Frank Scalese at [fscalese@blueocean.us.com](mailto:fscalese@blueocean.us.com). Call **516-686-7070** or visit [blueocean.us.com](http://blueocean.us.com) for more information.

**Blue Ocean**  
Wealth Solutions

A member of the MassMutual Financial Group