Meesha Bodman Earns Safeco Insurance® Award of Excellence for Superior Underwriting Skill

Meesha Luce Bodman, ACSR

Meesha Bodman of Allen Insurance and Financial has earned the Safeco Insurance Award of Excellence, an honor recognizing superior underwriting skill that is achieved by a select group of agents across the country who sell Safeco Insurance.

“We are proud to say that Meesha is again part of this elite group of insurance agents,” said Michael Pierce, president of Allen Insurance and Financial. “Meesha’s dedicated, professional service to our clients has earned her this award for the fourth consecutive year.”

The Safeco Award of Excellence honors outstanding agents who have developed a solid underwriting relationship with Safeco and whose agencies have qualified for the Safeco Insurance Premier Partner Award, the company’s top recognition program.

Bodman, a resident of Hope, joined Allen Insurance and Financial in 2006. In 2013 she earned her Accredited Customer Service Representative (ACSR) designation. She has been a member of the Maine Insurance Agents Association Young Agents Committee since 2013 and was named Maine’s Young Professional of the Year in 2017. She is based in the agency’s Rockland office.

Allen Insurance and Financial is a multi-year President’s Award and Premier Partner agency, recognition given only to the best independent insurance agencies that sell Safeco. Safeco is a Liberty Mutual Insurance company.

Holly Shields Earns CPIA Designation

Holly
Shields

Holly Shields, a member of the personal insurance team at L.S. Robinson Co. insurance, recently earned the designation of Certified Professional Insurance Agent (CPIA), a professional designation conferred by the American Insurance Marketing and Sales Society (the AIMS Society).

The CPIA designation, received after completion of three in-depth seminars, stands for professionalism, commitment to sales training and results, and technical knowledge. The designation requires a bi-annual continuing education update.

Shields has been with L.S. Robinson since 2008. She also holds the Accredited Customer Service Representative in Personal Lines designation.

The AIMS Society is the only insurance organization dedicated solely to recognizing training and service quality among property and casualty insurance personnel. The mission of the AIMS Society is to improve the selling skills and insurance knowledge of its members by upgrading professionalism through

information and education, which will result in providing better service to the insurance-buying public.
L.S. Robinson Co. is a division of Allen and Financial,operating in Southwest Harbor, Maine.

Chris Richmond Earns CMIP Designation From International Institute for Marine Insurance Studies

Chris Richmond

Chris Richmond, a member of the marine insurance division at Allen Insurance and Financial, recently earned the designation of Certified Marine Insurance Professional (CMIP) from the International Institute for Marine Insurance Studies.
CMIP is the premier practical training and designation program in marine and longshore insurance.
Richmond, a licensed mariner and former schooner captain, works with mariners and boat yard owners in Maine and around the U.S. and heads up a marine insurance program endorsed by Tall Ships America, working with the owners and crew of the nation's most historic sailing vessels. Richmond also holds the Accredited Advisor in Insurance (AAI) designation from The Institutes Risk & Insurance Knowledge Group and is a member of the board of

directors of the Maine Marine Trades Association.

Planning Giving Seminar for Area Non-Profits

Abraham
Dugal

Allen Financial of Camden advisors and wealth managers Sarah Ruef-Lindquist, JD, CTFA, and Abraham Dugal were the featured speakers at an event attended by a number of Maine non-profit organizations, held at and hosted by the Island Institute in Rockland.
Dugal and Ruef-Lindquist presented the program “The Ultimate Equation: Donor Passion + Thoughtful Planning = Planned Gifts Is your organization prepared?” Learn how to build strong policy foundations to support planned gifts and endowments.
Among those organizations participating were the Schoodic Institute, Farnsworth Art Museum, Midcoast Recreation Center, Mildred Stevens Williams Memorial Library, Harbor House, Island Institute and Georges River Land Trust.

Sarah Ruef-
Lindquist,
JD, CTFA

Dugal and Ruef-Lindquist spoke about the policy foundations and recognition practices they view as necessary to have fiscally-sound and successful planned giving programs and endowment funds.

Dugal’s background at Fidelity Charitable Gift Fund and Cambridge Associates in Boston position him as a seasoned advisor in the area of endowment management. He reviewed the detailed aspects of sound fiscal policies that boards include in order to fulfill their fiduciary duties related to both investment and spending.

Given the unprecedented intergenerational transfer of wealth taking place in the United States, and the projections for gifts to non-profit organizations during the next 30 to 40 years in the trillions of dollars, organizations would be well-served to pay greater attention to this area of resource development to build their long-term financial sustainability, Ruef-Lindquist said.

Anna Moorman Recognized for Medicare Sales Production

Anna
Moorman

Anna Moorman of Allen Insurance and Financial has been recognized as a top Medicare producer in Maine. Moorman is one of two agents at the company who specialize in the complex market of Medicare insurance, working with a number of insurance carries to give customers a range of choices to suit their needs.

Moorman and her colleague Jo-Ann Neal are based in the company's Chestnut Street offices in Camden.

"Medicare is very complex and both Anna and Jo-Ann enjoy helping clients navigate the Medicare maze by simplifying the process," said Michael Pierce, company president. "At Allen Insurance and Financial, our goal is to provide dedicated, one-on-one attention to our Medicare customers, assessing each person's needs and finding options that will align with their budget and healthcare goals."

At a recent luncheon in Bangor, Anthem recognized Moorman for her work in the Medicare market, where she received an award for being the second highest performing broker for Anthem Medicare Supplement sales in 2017 for the State of Maine. She also received a second award for overall production of Anthem Medicare policies written in 2017, coming in fourth in a field of more than 200 brokers.

Sarah Ruef-Lindquist Featured Speaker at May meeting of the MDI Nonprofit Alliance

Sarah Ruef-Lindquist, JD, CTFA

Sarah Ruef-Lindquist, JD, CTFA of Allen Financial was the featured speaker at the May meeting of the MDI Nonprofit Alliance (MDINA) held recently at the Acadia National Park Headquarters offices.

MDINA is a collaborative group of nonprofits in the Mount Desert Island area who share event planning, development and other resources, including educational programming, to support their respective missions. Some of the participant groups who were represented at the meeting include the Criterion Theatre, Camp Beechcliff, Jackson Laboratories, Jesup Library, Schoodic Institute, MDI Nursing Association, Island Connections, YWCA, Bar Harbor Food Pantry, Southwest Harbor Library, Friends of Acadia, Wendell Gilley Musuem, Healthy Acadia and Island Housing Trust and host, Acadia National Park.

Ruef-Lindquist spoke about the policy foundations and recognition practices she views as necessary to have fiscally-sound and successful planned giving programs. Her background as an attorney, financial and philanthropic advisor, trust officer and board member contribute to her unique perspective as an advisor and fiduciary and how they approach potential gifts through clients' estate and financial planning. She was invited to present as a long-time member of the board of the Maine Planned Giving Council, an association of non-profit board and staff as well as professional advisors involved in the industry of gift planning.

Given the unprecedented intergenerational transfer of wealth taking place in the United States, and the projections for gifts to non-profit organizations during the next 30 to 40 years in the trillions of dollars, organizations would be well-served to pay greater attention to this area of resource development to build their long-term financial sustainability, Ruef-Lindquist said. She is no stranger to Hancock County, having worked as a Senior Administrative Trust officer for Union Trust until a merger in 2008 with Camden National, and as a past board member and development chair for the Abbe Museum.

Welcoming Charles Luce

Charles Luce

Charles Luce has joined Allen Insurance and Financial as a Group Benefits Account Manager in the company's Benefits Division.

Luce, who has his State of Maine Life, Accident & Health Producer's license, will work with clients on a variety of insurance products, including group health, life, dental and disability insurance.

Luce is based at the company's offices at 31 Chestnut Street in Camden. He joined the company in March 2018.

Luce is a graduate of Dartmouth College, in Hanover, N.H. He brings decades of experience in the financial services industry, including Fidelity Investments, Nationwide Insurance, and more than over nine years with Unum, as well as valuable group benefits agency and brokerage experience.

He and his wife and twin 16-year old daughters live in Camden.

Wendy Byrd, Group Benefits Account Manager, Obtains Life & Health License

Wendy Byrd

Wendy Byrd, group benefits account manager at Allen Insurance and Financial, has obtained her State of Maine Life and Health insurance license so that she can help clients with a variety of insurance products, including health, life, dental and disability insurance.

Byrd joined Allen Insurance and Financial in July 2017 and is based in the company's Benefits Division, located at 31 Chestnut Street in Camden. She assists clients with insured benefits questions.

Byrd is a graduate of Lewiston High School and the University of Maine, and is certified as a benefits account manager by the National Association of Health Insurance Underwriter (NAHU).

The NAHU Benefits Account Manager Certification provides account manager professionals with an understanding of the complex and critical role an account manager plays in the health and benefits arena.

Sherree Craig Achieves NAHU Advanced Self-Funding Certification

Sherree L.
Craig, CEBS

Sherree L. Craig, CEBS, senior account executive in the Insured Benefits Division at Allen Insurance and Financial, has achieved an Advanced Self-Funding Certification from the National Association of Health Underwriters.

The NAHU Advanced Self-Funding Certification ensures knowledge of regulatory concerns, service model options, cost-containment strategies and underwriting concepts necessary for providing advice and direction on employer self-funded health plans.

Craig has been with Allen Insurance and Financial for 20 years. She works with businesses across Maine on their employee benefits offerings.

“Employers have limited options to control their own health plan expenses with an insurance company. Self-funding is a valuable tool to consider for a company’s health plan strategy,” said Craig. “This certification allows me to better assist businesses who elect to self-fund their medical plans with using the most cutting edge cost-control techniques, while assuring that they are fulfilling their plan sponsor obligations.”

Deb McDonald Achieves ACSR Designation

Deb
McDonald

Deb McDonald, a business insurance account manager at Allen Insurance and Financial recently achieved the designation of Accredited Customer Service Representative in Commercial Lines from the Independent Insurance Agents & Brokers of America.

McDonald has been with Allen Insurance and Financial since 1995. She lives with her family in Union.

The ACSR designation program was developed to recognize the contribution made to each customer by the service they are provided through independent insurance agencies such as Allen Insurance and Financial.

Independent Insurance Agents & Brokers of America is the nation's oldest and largest national association of independent insurance agents & brokers with more than 300,000 members. Find them online at independentagent.com.