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.](independentagent.com)

Welcome Jaime Hannan-McMurrin

Jaime Hannan-McMurrin.

Jaime Hannan-McMurrin of Union has joined Allen Insurance and Financial as a processor in the company's business insurance division. She is based in Camden.

Before coming to work for Allen Insurance and Financial, Hannan-McMurrin, a native of Warren, worked for a local bank and then a local insurance agency, gaining valuable account and customer service experience. She earned her Maine property & casualty insurance license in 2016.

Outside of work, Hannan-McMurrin enjoys spending time with her two daughters, especially when they are scrapbooking or taking a Zumba class.

"I love my job," she said. "I work with great people, I find myself doing something different every day and every day is a challenge. I love the learning and opportunity to learn so much more."

Chris Richmond Elected to Board of Directors of Maine

Marine Trades Association

Chris
Richmond

Chris Richmond, a member of the marine insurance division of Allen Insurance and Financial, has been elected to a three-year term on the board of directors of the Maine Marine Trades Association.

Richmond, based in the company’s Camden office, is a former schooner captain who maintains his USCG 100-ton master’s license. He specializes in marine insurance, working with boat yards, builders and owners across the U.S.

Richmond has been with Allen Insurance and Financial since 2011. He is a graduate of The American University in Washington, D.C., and the Landing School of Boat Building and Design, where he serves on the school’s program advisory board.

Sarah Ruef-Lindquist Takes Part in Panel Discussion at Maine Planned Giving Council Meeting

Sarah Ruef-Lindquist, JD, CTFA

Sarah Ruef-Lindquist, JD, CTFA, a financial planner at Allen Insurance and Financial in Camden, recently participated in a panel discussion at the Maine Planned Giving Council's conference held in South Portland attended by approximately 150 professionals involved in the gift planning industry.

Attendees included development professionals and executives from non-profit organizations, and professionals who advise donors in estate or financial planning, including attorneys and accountants, from across the state.

Ruef-Lindquist has had a role in planned giving as an attorney, former trust officer and philanthropic advisor and consultant to non-profits across New England. She previously served as vice president for Southern Maine of the Maine Community Foundation and CEO of the Maine Women's Fund.

Along with Kristen Farnham, Vice President of Development at Spurwink and Sarah McPartland Good, Director of Planning Giving at the University of Maine Foundation, Ruef-Lindquist led more than 40 people in a discussion about marketing planned giving, noting that one size does not fit every organization.

Ruef-Lindquist and the other panelists provided examples from organizations large and small, including universities, colleges, land trusts, social service organizations and others, demonstrating how to best reach those whose passions and loyalties to the mission of a particular organization compel them to consider making gifts through their planning to them.

Planned gifts often support building the long-term funds of organizations, including their endowment, and serve as a means of providing financial sustainability for the long term. Because of the projected intergenerational transfer of a vast amount of wealth occurring now in the U.S., the topic is of great interest to organizations and the advisors working with their donors.

Amanda Corson Now Licensed to Sell Life Insurance in Maine

Amanda Corson

Amanda Corson, a personal insurance account manager in our Southwest Harbor office, is now licensed to sell life insurance in Maine.

Our Southwest Harbor office operates as L.S. Robinson Co., the independent insurance agency which has served Mount Desert Island since 1932.

“Expanding her insurance knowledge to life insurance will allow Amanda to better serve our agency’s personal insurance customers,” said Scott Carlson, manager of the personal insurance division at Allen Insurance and Financial.

Meesha Bodman Named Young

Professional of the Year

Meesha Luce
Bodman,
ACSR

Meesha Bodman, ACSR, a member of the personal insurance team at Allen Insurance and Financial, has been named Young Insurance Professional of the Year by the Maine Insurance Agents Association.

Bodman is a member of the MIAA Young Agent Committee, which was founded in 1982 as a way for agents younger than 40 to break into a veteran industry. Bodman received her award Oct. 19 at the MIAA-YAC annual meeting in Portland.

Bodman joined Allen Insurance and Financial in 2006. A people person, she enjoys meeting with clients and working with them to meet their insurance needs and in 2016 earned her license to sell life insurance in Maine.

She holds an Accredited Customer Service representative (ACSR) designation. A graduate of Medomak Valley High School, Bodman lives in Hope where, outside of work, she enjoys spending time with friends and family.

“All of us here at Allen are incredibly proud of Meesha’s professionalism and commitment to both customers and community,” said Scott Carlson, personal insurance division manager at Allen Insurance and Financial. “Meesha is a real embodiment of our company’s values.