

Christopher Beaulieu Joins Our Financial Planning Division



Christopher
Beaulieu

Christopher Beaulieu of Waterville has joined Allen Insurance and Financial as a broker-dealer assistant. He is the third generation of his family to work for the company's financial planning division.

Beaulieu is a graduate of Belfast Area High School and a student at the University of Maine at Augusta. His father Brian Beaulieu is a financial planner with Allen Insurance and Financial and is based in Belfast. His grandfather, Gary Beaulieu, who retired in 2000, was the first financial planner working for what was then Allen Agency/Allen Financial Group.

At the Allen Insurance and Financial office at 18 Common St. in Waterville, Christopher Beaulieu is working as an assistant to Norm Hart, financial planner. Allen Insurance and Financial opened its Waterville office in 2016.

"I have always believed in helping others, and here at Allen I will be given many opportunities to do just that," said Beaulieu. "I am proud to follow in the footsteps of my father and grandfather. That makes my work here even more gratifying."

Outside the office, Beaulieu enjoys playing soccer, running and biking as well as spending time camping, hiking, hunting and fishing in the Maine outdoors.

New Employee: Wendy Byrd

Wendy Byrd of Appleton has joined Allen Insurance and Financial as an account manager in the company's insured benefits division.



Wendy Byrd

Byrd, a graduate of Lewiston High School and the University of Maine, is certified as a benefits account manager by the National Association of Health Insurance Underwriter (NAHU). She is based in Camden at our Chestnut Street office.

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.

"I enjoy working with clients as well as resolving unexpected issues," said Byrd.

"I enjoy the challenge of learning something new every day."

Outside of work Byrd enjoys reading, cooking and spending time with her son.

Meesha Luce of Allen Insurance and Financial Earns Safeco

Insurance® Award of Excellence for Superior Underwriting Skill

☒ Meesha Luce 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.

“This award is recognition of Meesha’s providing our agency’s clients with dedicated, professional service. We are proud to say she is one of Safeco’s top agent partners again in 2017,” said Michael Pierce, president of Allen Insurance and Financial. Luce has now earned the Award of Excellence for three consecutive years. The award 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.

Luce, 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. Luce 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.

Stephanie Griffin, ACSR Graduates from Midcoast Leadership Academy



Stephanie
Griffin

Midcoast Leadership Academy and the University of Maine Hutchinson Center have announced completion of the academy's seventh program year and the July 2 graduation of 18 current and prospective community leaders. One of those graduates is [Stephanie Griffin](#), ACSR, a member of the business insurance division at Allen Insurance and Financial.

Graduates this year were Alyssa Ames, practice manager at Waldo County General Hospital; Penson Bartlett, North Region manager, Jobs for Maine Graduates; Maggi Blue, freelance artist and designer/marketer; and Megan Brackett, finance director, Town of Rockport.

Also, Kristin Collins, operations director, Island Institute; Karla Doremus-Tranfield, global director, water treatment, Gulbrandsen Technologies; Kristin Flynn, owner, Kristin Flynn Photography and Ken Gross, assistant director, Camden Public Library.

Also, Jodie M. Heal, president, CPA, MAFM, Heal Accounting Solutions, PC; Abbie Leonard, harbormaster, town of Rockport; Amy Levine, library director, Rockland Public Library; Jake Miller, VP/branch manager, First National Bank; and Denise Pease, sales and marketing director, Quarry Hill.

Also, Wyatt Philbrook, vineyard and property manager, Cellardoor Winery; Lisa Phillips, AVP, banking center manager, Camden

National Bank; Amy Smith, assistant director for academic and student services, Hutchinson Center; and Kim Wilson-Raymond, conference coordinator, Hutchinson Center.

Guest speaker at the graduation was Tom Peaco, executive director of Penobscot Bay Regional Chamber of Commerce and a graduate of MLA 6.

Modeled after successful community leadership programs held throughout the country, MLA7 was run as a partnership between the University of Maine Hutchinson Center and Midcoast Leadership Academy. Guest faculty are drawn from academia, business, government, consulting and the nonprofit sector.

Carolyn Mitchell Achieves ACSR Designation

[Carolyn Mitchell](#), a personal insurance account assistant based in the Camden office of Allen Insurance and Financial recently achieved the designation of Accredited Customer Service Representative in Personal Lines from the Independent Insurance Agents & Brokers of America.



Carolyn
Mitchell

Mitchell of Camden, has been with the company for 13 years.

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.

Holly Shields Honored by Acadia Council of REALTORS®



Holly Shields, left,
and Laura Pellerano.

Holly Shields, a personal insurance account manager at L.S. Robinson Co., the Southwest Harbor office of Allen Insurance and Financial, has been named 2016 Affiliate Member of the Year by the Acadia Council of REALTORS®. The award was presented by Laura Pellerano, a REALTOR® with Acadia Realty Group in Ellsworth and the council president.

The Affiliate of the Year award is voted by the council members. The award was announced at an annual luncheon, held Jan. 26 at the Hancock County Technical Center in Ellsworth.

The Acadia Council of REALTORS® has 187 members in Hancock and Washington counties and is part of the Mid-Coast Board of

Holly Hill-Coombs Earns ACSR Designation



Holly Hill-
Coombs

Holly Hill-Coombs, an account manager assistant 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.

Hill-Coombs also holds an ACSR designation in Personal Lines. She works in Allen Insurance and Financial's Special Business Unit in Camden, serving a variety of business customers from around Maine.

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.

Sarah Ruef-Lindquist Joins Allen Insurance and Financial



Sarah Ruef-Lindquist, JD, CTFA

Sarah Ruef-Lindquist of Camden has joined the financial services division of Allen Insurance and Financial.

Her focus on endowment building through planned giving, wealth management and estate planning with special attention to women's planning needs results from her extensive background in non-profit management and fiduciary, legal and financial advisory roles. She will be based at the company's office at 31 Chestnut Street in Camden.

Before joining Allen Insurance and Financial, Ruef-Lindquist spent more than four years as the CEO of the Maine Women's Fund where she expanded grant-making and statewide engagement, and strengthened the Fund's financial future, doubling the fund's assets during her tenure.

A lawyer and former bank trust officer who holds the Certified Trust and Financial Advisor designation, Ruef-Lindquist has also worked with the Maine Community Foundation, Union Trust, Colby College, Pen Bay Healthcare Foundation and Planning for Good, a consulting firm she founded. She is a member of the Board of Trustees at Unity College and a member of the Board of Directors of the Maine Planned Giving Council. She serves as acting chairman of Maine's Permanent Commission on the Status of Women and Girls, to which she was appointed by the former Speaker of the House, Mark Eves.

"The addition of Sarah is a huge plus for Allen Insurance and

Financial and for our clients. We're fortunate to have such a seasoned professional join our team," said Mike Pierce, agency president and head of the financial planning division.

Ruef-Lindquist lives in Camden with her husband. Outside of work, you can find her serving as a member of the National Ski Patrol at the Camden Snow Bowl, or tending to her backyard chickens. She is a member of West Bay Rotary.

Dan Bookham Named Company Vice President



Dan Bookham

Allen Insurance and Financial, a financial services, insurance and employee benefits company, has announced that Dan Bookham of Rockland has been appointed a vice president of the corporation by the board of directors.

Bookham joined the company's business insurance division in September 2012 after four years as executive director of the Penobscot Bay Regional Chamber of Commerce. He was named Business Development Director in 2013. As vice president, Bookham will join the corporation's board of directors.

Bookham holds the Accredited Adviser in Insurance designation and is a member of the International Association of Maritime & Port Executives.

In the community, Bookham serves as chairman of the Board of Trustees of the LifeFlight of Maine Foundation, on the boards of

the Penobscot Bay YMCA and the New England Ocean Cluster technology incubator, and as a member of America's Edge (a nationwide organization advocating for investment in early childhood development and education).

"This new position is a testament to Dan's ability to get things done with energy and focus. We're pleased to have him in this leadership role at our company and we look forward to the contributions he'll make," said Mike Pierce, president of Allen Insurance and Financial.

Meesha Luce Earns Award of Excellence from Safeco



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"This award is recognition of Meesha's providing our agency's clients with dedicated, professional service. We are proud to say she is one of Safeco's top agent partners again in 2016," said Michael Pierce, president of Allen Insurance and Financial. Luce has now earned the Award of Excellence for two consecutive years. The award 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. Luce is based in the agency's Rockland office.

Luce, 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.

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