

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.

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.”

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.