

# 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](http://independentagent.com).

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# 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 Realtors and the Maine Association of REALTORS®.

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## 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.

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## **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.

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## **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.

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# Meesha Luce Earns Award of Excellence from Safeco



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 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.

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.

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# Learning More to Best Serve Our Customers



Kim Edgar

Allen Insurance and Financial of Camden is pleased to announce that Kimberly Edgar has successfully completed the National Association of Health Insurance Underwriter's Voluntary/Worksite Certification Course.

Used by companies as one tool to attract and retain employees. Voluntary/Worksite insurance products are more popular than ever. There are many new insurance products, with new features and new enrollment technologies – and many changes to the underwriting rules of these products. This means insurance agents need to know more to best serve their customers.

The NAHU course emphasizes a strong technical knowledge of rules and regulations pertaining to various types of voluntary/worksite products and proven methods for communicating those options to employers and employees. Kim works regularly with HR directors and other administrators at local businesses to explain the intricacies of these insurance products to their employees.

Edgar participated in the NAHU program under the auspices of Allen's in-house education program which emphasizes continuing education for all of the agency's 69 employees.

Edgar is an account manager in Allen Insurance and Financial's insured benefits division, specializing in dental, life, disability, and worksite benefits. She joined the company in 2014.

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# Jeremy Pickford Earns AAI Designation



Jeremy  
Pickford

Allen Insurance and Financial is pleased to announce that Jeremy Pickford, a member of the business insurance team in the company's Camden office, has earned an Accredited Adviser in Insurance designation from the American Institute for Chartered Property Casualty Underwriters.

Designations such as AAI demonstrate an insurance broker's tested knowledge in their field. Allen Insurance and Financial supports all its employees in their efforts to continue their education.

The AAI program requires nine separate exams; the course outlines risk analysis techniques and tools, while providing an in-depth understanding of commercial insurance products and services.

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## A Best Place to Work in Maine



## – 5 Years Running

For the fifth consecutive year, Allen Insurance and Financial has been named as one of the Best Places to Work in Maine. The awards program was created in 2006 and is a project of the Society for Human Resource Management (SHRM) – Maine State Council and Best Companies Group.

This statewide survey and awards program was designed to identify, recognize and honor the best places of employment in Maine, benefiting the state's economy, its workforce and businesses. The 2016 Best Places to Work in Maine list is made up of 75 companies in three size categories: small (15-49 U.S. employees), medium (50-249 U.S. employees) and large (250+ U.S. employees).

Allen Insurance and Financial, with 68 employees in offices in Rockland, Camden, Belfast and Southwest Harbor, is in the medium category, which is the largest of the three categories, with 36 businesses making the list.

Companies from across the state entered the two-part process to determine the Best Places to Work in Maine. The first part consisted of evaluating each nominated company's workplace policies, practices, and demographics. This part of the process was worth approximately 25% of the total evaluation.

The second part consisted of an employee survey to measure the employee experience. This part of the process was worth approximately 75% of the total evaluation. The combined scores determined the top companies and the final rankings. Best Companies Group managed the overall registration and survey process in Maine and also analyzed the data and used their expertise to determine the final rankings.

Allen Insurance and Financial will be recognized and honored at the Best Places to Work in Maine awards ceremony on October 4. The final rankings will be announced at the event. Partners endorsing the program include: Mainebiz, the Maine State Chamber

# **Brandy Schofield Earns Consumer Directed Health Care Certification**

✖ Allen Insurance and Financial of Camden is pleased to announce that Brandy Schofield has successfully completed the National Association of Health Insurance Underwriter's Consumer Directed Health Care Certification Course.

The Consumer Directed Health Care Certification provides account manager professionals with strong technical knowledge of the rules and regulations pertaining to various types of consumer directed health care options and proven methods for communicating those options to employers and employees in a compelling way.

Consumer directed health care options, including those for Health Savings Accounts (HSAs), Flexible Spending Accounts (FSAs) and Health Reimbursement Arrangements (HRAs), have opened new opportunities for consumers and created new responsibilities for agents and brokers.

Schofield participated in the NAHU program under the auspices of Allen's in-house education program which emphasizes continuing education for all of the agency's 68 employees.

She is an account manager in Allen Insurance and Financial's insured benefits division.