

# 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

of Commerce and Maine HR Convention.

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# **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.

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# Jo-Ann Neal Earns BAM Designation



Jo-Ann Neal

Allen Insurance and Financial of Camden is pleased to announce that Jo-Ann Neal has successfully completed the National Association of Health Insurance Underwriter's Benefits Account Manager Certification Course.

The 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.

Neal 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.

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

Neal joined the company in 2013 and works with clients on group benefits. She also assists individuals enrolling in Medicare and individual health insurance.

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# Valerie Robinson Earns ACSR Designation



Valerie  
Robinson

Valerie Robinson, 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.

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 Earns ACSR Designation



Holly  
Shields

Holly Shields, a personal insurance account executive at L.S. Robinson Co. insurance recently achieved the designation of Accredited Customer Service Representative in Personal Lines from the Independent Insurance Agents & Brokers of America.

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 L.S. Robinson Co.

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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## **Allen Insurance and Financial Again Appointed to The Hanover's President's Club**

The Hanover Insurance Group recently honored Allen Insurance and Financial with an appointment to its President's Club, an elite group of independent insurance agencies from across the country. The Hanover partners with only 2,200 out of a total of 35,000 total independent agents in the country. Across The Hanover's agents, an elite group of only 125 are honored in its President's Club each year as the company's top performers, delivering value to customers through strong insurance expertise and responsive service.

"Allen Insurance and Financial exemplifies what it means to be a truly professional independent agent, providing expert insurance



advice, dedicated service and a broad range of products to meet the needs of its customers,” said Frederick H. Eppinger, president and chief executive officer of The Hanover.

This is the second consecutive year Allen Insurance and Financial has earned the Hanover’s President’s Club designation. The agency will be recognized at a national business conference sponsored by The Hanover later this year.

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## **Employees Earn State Life Insurance License**



Meesha Luce

Allen Insurance and Financial is pleased to announce that Meesha Luce, Leann McMusic and Chris Wilson are now licensed to sell life insurance in Maine.



Leann  
McKusic

All three are personal insurance account managers in Allen’s Rockland office.

“Expanding their insurance knowledge to life insurance will allow Meesha, Leann and Chris to better serve our agency’s personal insurance customers,” said Mike Dufour, Allen Insurance and Financial’s executive vice president.



Chris  
Wilson

They studied for the state exam through the Allen Insurance and Financial's in-house education program.

"We see payback every day – our people receive support and the most up-to-date information and in turn they offer superior service to our clients," Dufour said.