

# Michael Pierce Recognized as a Leading Financial Advisor by Commonwealth Financial Network® in 2016

✖ Michael Pierce, an independent financial advisor affiliated with Commonwealth Financial Network® and president of Allen Insurance and Financial in Camden, has achieved Commonwealth Leaders status for 2016. This distinction recognizes successful financial advisors based on a ranking of annual production among Commonwealth's network of more than 1,650 financial advisors. Commonwealth is the nation's largest privately held independent broker/dealer-RIA.

Wayne Bloom, CEO of Commonwealth, said, "We are pleased to recognize Mike with this exclusive distinction. Achieving Leaders status speaks to his track record of success and commitment to his practice and the clients he serves. As a well-respected advisor within the independent advice industry and an esteemed member of the Commonwealth community, we look forward to Mike's participation."

About Allen Insurance and Financial

Allen Insurance and Financial has been providing individuals and organizations with insurance services and financial guidance since 1866. Located at 31 Chestnut St., Camden, Maine, 04843, the advisors of Allen Insurance and Financial pride themselves on crafting unique strategies for each client. For more information, please visit [www.allenif.com](http://www.allenif.com). Securities and Advisory Services offered through Commonwealth Financial Network®, Member FINRA, SIPC, a Registered Investment Adviser. Fixed Insurance products and services offered through Allen Insurance and Financial or CES Insurance Agency.

## About Commonwealth Financial Network

Founded in 1979, Commonwealth Financial Network, member FINRA/SIPC, is the nation's largest privately held independent broker/dealer–RIA, with headquarters in Waltham, Mass., and San Diego, Calif. The firm supports more than 1,650 independent advisors nationwide in serving their clients as registered representatives, investment adviser representatives, and registered investment advisers, as well as through hybrid service models. For more information, please visit [www.commonwealth.com](http://www.commonwealth.com).

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# Anna Moorman Among Martin's Point Generations Advantage Top Producers in Maine



Anna  
Moorman

Anna Moorman of Allen Insurance and Financial has received an award from Martin's Point Generations Advantage as one of their Top 10 performing producers in Medicare sales for the State of Maine.

Anna has been with Allen Insurance since 2012 and assists people who are ageing-into the Medicare system, as well as those in the community who are in need of guidance and advice on their Medicare options. Anna offers dedicated, one-on-one attention to find a product that will align with each client's budget and

healthcare needs.

Martin's Point Generations Advantage plan has received a 5 out of 5 star rating from the Center for Medicare Services, and is one of only 12 plans throughout the country to receive the highest rating possible. Allen Insurance and Financial is one of a small group of selected brokers in Maine who are appointed with Martin's Point to offer their plans.

To schedule a meeting with Anna, please contact Allen Insurance at 207-236-4311.

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## Continuing Education: 3 New ACSRs



Mallory  
Arsenault

Three members of the Allen Insurance and Financial staff recently achieved the designation of Accredited Customer Service Representative in Commercial Lines from the Independent Insurance Agents & Brokers of America.

They are: Stephanie Griffin, Special Business Unit Account Assistant; Mallory Arsenault, Business Insurance Account Manager Assistant and Kathi Jones, manager of accounting, HR and IT.



Stephanie  
Griffin

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.



Kathi Jones, ACSRIIndependent 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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## Jo-Ann Neal Now Licensed for Medicare

Jo-Ann Neal of Allen Insurance and Financial has obtained her license to present Medicare insurance options to Allen clients.



Jo-Ann Neal

“Medicare coverage and insurance policies that help fill the gaps of Medicare can be complex and confusing,” said Dan Wyman, manager of Allen’s insured benefits division. “Jo-Ann and Anna Moorman of our office can help our clients pick the best plans as they approach Medicare eligibility.”

Jo-Ann works with both individuals and groups on their insurance benefits policies, including health, dental, life, and disability. She joined the company in 2013, earning her license

to sell health and life insurance in Maine through Allen's in-house education program.

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# Krissy Campbell Earns CIC Designation



Krissy  
Campbell,  
CIC, ACSR

The designation of Certified Insurance Counselor has been conferred upon Krissy Campbell, director of the special business unit at Allen Insurance and Financial.

Campbell earned the designation through a series of rigorous written exams focusing on all major fields of insurance, agency operations and insurance management. The professional dedication and commitment represented by this achievement sets the standard within the insurance industry.

As director of the special business unit, Campbell works with a wide variety of small businesses which make up the heart of the Maine economy.

"Krissy's emphasis on professional development continues to set a great example for her colleagues and shows her deep commitment to making sure they receive her best possible insurance counseling," said Mike Pierce, agency president.

Campbell, of Warren, joined Allen Insurance and Financial in 2005. She is based in Allen Insurance and Financial's Elm Street

office in Camden. [adsense ban](#)

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# A Best Place to Work in Maine 2015

Allen Insurance and Financial was recently named as one of the 2015 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 2015 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, with 68 employees, is in the medium category. This is the largest of the three categories, with 40+ of Maine's best-known businesses.

To be considered for participation, companies had to fulfill the following eligibility requirements:

- Have at least 15 employees working in Maine;
- Be a for-profit or not-for-profit business or government entity;
- Be a publicly or privately held business;
- Have a facility in the state of Maine; and
- Must be in business a minimum of 1 year.

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 7 and will be profiled in a special publication by MaineBiz. The final rankings will be announced at the event.

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## **Welcoming Financial Advisor Abraham Dugal**

Abraham Dugal has joined Allen Insurance and Financial as a financial advisor.

✖ A native of Lincolnville, Dugal is a graduate of Camden Hills Regional High School and Babson College in Wellesley, Mass., where he majored in business management with a concentration in finance.

Dugal worked in the financial services industry in the Boston area for almost 10 years before returning home to Midcoast Maine. Before joining Allen Insurance and Financial, he worked for Cambridge Associates, a global investment management firm

holding positions focused in custom client portfolio analysis and operations, portfolio risk. Most recently he was director of U.S. investment operations for Cambridge Associates.

Dugal says he is excited to return to the area where he grew up and to have the opportunity to engage with members of the community and to work with them to find solutions to their financial planning and investment needs.

Dugal and his wife Anna live with their young son in Camden.

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## **Meesha Luce Recognized With Safeco Award of Excellence**



Meesha Luce, a personal insurance specialist at Allen Insurance and Financial has been honored with the Award of Excellence for her superior underwriting skills and long-term commitment to Safeco® Insurance, member of Liberty Mutual Group.

This prestigious award recognizes those individuals with superior underwriting skills who have developed a solid underwriting partnership with Safeco. Agents who earn this designation will have the ability to make selected underwriting decisions, attend an awards ceremony and receive a recognition gift.

Luce, a resident of Owls Head, 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.



In addition 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.

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## Stephanie Griffin Wins Next Step Maine Scholarship

Stephanie Griffin, Special Business Account Assistant in our business insurance division in Camden has been awarded a 2015 Next Step Maine Scholarship in the amount of \$1,500.

Stephanie, who graduated high school in 1996, is a now senior at the University of Maine in Augusta, majoring in public administration, with a minor in human resources.

The Next Step Maine scholarship program is part of the Maine Development foundation. The agency wrote a letter in support of Stephanie's application.



Stephanie, second from left,  
with Jean Dutch, Allen  
Insurance operations

manager, second from right.

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## Heidi Swiderek Joins Our Team in Rockland

Heidi Swiderek has joined Allen Insurance and Financial as a commercial lines account manager based in the company's Rockland office.



Heidi Swiderek

Heidi has nearly 30 years of experience in the insurance industry, including four years with Allen from 2004-2008. Most recently, she was senior underwriter in risk management services for the Maine Municipal Association.

In addition to her education and experience in commercial insurance, Heidi has been recognized for her customer service skills, including being the recipient of an Outstanding Customer Service Representative of Maine award presented by the Governors of the Societies of Certified Insurance Counselors and Certified Insurance Service Representatives.