

Dan Bookham Embraces New Leadership Role on LifeFlight Foundation Board of Trustees



Dan Bookham

At its January meeting, the LifeFlight Foundation Board of Trustees elected Daniel Bookham, a business insurance specialist and director of business development at Allen Insurance and Financial, to serve as chair. Bookham joined the board in 2012 and has provided guidance around issues relating to fundraising, communications and nonprofit management.

“Dan has been a strong asset to the LifeFlight Foundation since he agreed to come on board in 2012,” says LifeFlight Executive Director Thomas Judge. “He has helped generate support for LifeFlight among his business community connections, and the Foundation staff has gained valuable insights from his media background and fundraising experience from numerous nonprofits in midcoast Maine.”

Since joining the LifeFlight Board, Dan has played an important role in developing the organization’s strategic communications plan, and has been adept at creating opportunities for collaboration with business owners interested in helping LifeFlight. Dan and his wife, Jessie, were integral to the success of the first annual Islesboro Crossing which raised nearly \$25,000.

Previously, Bookham served as the executive director of the Penobscot Bay Regional Chamber of Commerce, and held several positions in the broadcasting industry. In the community, Bookham serves on the boards of the Penobscot Bay YMCA, United

Mid Coast Charities, the Strand Theatre, and the Camden Windjammer Festival; and is a member of the PenBay Health Care Strategic Planning Committee and America's Edge, a nationwide organization advocating for investment in early childhood development and education. Bookham is a graduate of the University of North London and the Midcoast Leadership Academy. Bookham resides in Rockland with his wife, daughter Scout, and their two dogs, making the most of all the cultural and outdoor activities the Midcoast has to offer.

LifeFlight of Maine is an independent 501(c)(3) non-profit air medical and critical care transport organization. LifeFlight helicopters, flying at 165 miles per hour, bring lifesaving critical care staff and equipment directly to the patient. Overseen by 21 physicians, LifeFlight has transported more than 16,000 patients from every hospital and nearly all of Maine's communities and islands since its inception in 1998. The LifeFlight Foundation, also a 501(c)(3) non-profit established in 2003, provides fundraising and communications support to LifeFlight of Maine. If you would like to learn more about LifeFlight, please visit www.lifeflightmaine.org or call 207-230-7092.

Joella Rossignol Earns Safeco Insurance® Award of Excellence for Superior Underwriting

Skill



Joella Rossignol

Joella Rossignol 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.

“Joella is dedicated to providing the protection our clients need at the right price,” said Mike Pierce, president of Allen Insurance and Financial. “Safeco shares that same dedication, and we are thrilled to be recognized as one of the company’s top agent partners.”

Joella has now earned the Award of Excellence four times. 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.

“Outstanding underwriting and strong partnerships benefit everyone in the industry – carriers, agents and customers,” said Debbie Akers, vice president for Safeco’s underwriting field operations. “That’s why Safeco Insurance is proud to honor these top agents with the Award of Excellence, the most prestigious underwriting recognition our independent agent partners can achieve.”

Joella is based in the company’s office at 156 High Street in Belfast. She joined Allen Insurance and Financial in 1999. [Read her bio on our website.](#)

In business since 1923 and based in Boston, Mass., **Safeco Insurance** sells personal automobile, homeowners and specialty products through a network of more than 10,000 independent insurance agencies throughout the United States. Safeco is a

Liberty Mutual Insurance company.

Boston-based Liberty Mutual Insurance is a diversified global insurer and the third largest property and casualty insurer in the U.S. based on 2012 direct premiums written as reported by the National Association of Insurance Commissioners. Liberty Mutual Insurance also ranks 81st on the Fortune 100 list of largest U.S. corporations, based on 2012 revenue.

For more information about Safeco Insurance, go to <http://www.safeco.com/>

Continuing Education Program Benefits Our Employees and Their Customers



Four members of the personal insurance team at Allen Insurance and Financial recently achieved the designation of Accredited Customer Service Representative from the Independent Insurance Agents & Brokers of America.

They are (clockwise, from top left): Chris Wilson, Meesha Luce, Leann McKusic and Holly Hill-Coombs. All are based in the company's Rockland office.

"The ACSR designation shows our people are well-educated members of the insurance industry," said Scott Carlson, personal insurance team manager. "Holly, Meesha, Leann and Chris are dedicated to improving their technical knowledge and enhancing their professionalism."

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.

Founded in 1866, Allen Insurance and Financial is an employee-owned insurance and financial planning services company with offices in Rockland, Camden, Belfast and Southwest Harbor, Maine. In 2014, the company will be celebrating the 25th anniversary of its employee stock ownership plan.

Bookham Named Director of Business Development



Dan Bookham

Allen Insurance and Financial is pleased to announce the appointment of Dan Bookham, a business insurance specialist, as the company's director of business development, a new position.

Bookham joined the company in September 2012 after four years as

executive director of the Penobscot Bay Regional Chamber of Commerce.

Other administrative changes effective Jan. 1, 2014 at Allen Insurance and Financial:

- The appointment of Jean Dutch as the company's Chief Operations Officer. She has also been named a vice president of the corporation. Dutch, of Belfast. She has been with the company since 1995.
- The appointment of Gene McKeever, a business and marine insurance specialist, as a vice president of the corporation. McKeever has been with Allen Insurance and Financial since March 1992.
- The retirement of Steve Crane and Peter Van Alstine from the company's board of directors. Crane, a former company president, retired from that position in November 2007. Van Alstine, a long-time financial advisor with the company, is retiring at the end of 2013.

The company's board of directors approved these changes at their annual meeting earlier this month.

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Lindsey Eaton Passes Maine P&C License Exam



Lindsey
Eaton

Allen Insurance and Financial is pleased to announce that Lindsey Eaton of Hope has obtained her license to sell property and casualty insurance in the state of Maine. She studied for the state exam through Allen's in-house education program.

As a scanning associate, Eaton plays a key role in Allen's paperless office system. She also supports members of the administrative staff and reception in the Camden office. She joined the company in February.

She is a Camden native and graduate of Camden Hills Regional High School.

The Allen Insurance and Financial education program allows the company's 70 employees to keep up with the always-changing insurance industry and to advance their careers through training and education.

Staff attend classes on company time as they prepare for their exams. Since the state also requires 24 hours of continuing education over every two-year period for those in the insurance business, Allen Insurance and Financial also offers those classes for their employees.

Welcoming Amy Bowen



Allen Insurance and Financial is pleased to announce that Amy Bowen will be joining the company's Belfast branch with a focus on business insurance.

"We have been warmly welcomed into the Belfast business community," said Michael Dufour, Allen executive vice president who oversees the company's business insurance division. "With her local roots and commitment to community, Amy is a great addition to our staff."

Allen Insurance and Financial opened its Belfast office in April 2013.

Bowen comes to Allen with more than 10 years of experience in the banking industry, most recently as an Assistant Branch Manager at Bangor Savings Bank in Belfast. She is looking forward to a change in careers from the banking industry to insurance. She will participate in the company's in-house education program.

Amy grew up in Belfast, attended Belfast High School, the University of Maine at Machias and Beal College in Bangor, receiving a degree in management. She lives in Belfast and is involved in the community through various organizations including Our Town Belfast, where she is a board member and treasurer and the Belfast Lions Club, where she is president.

Sara Montgomery

Along with her many friends and colleagues in Camden and around the state, we are mourning the passing Saturday, Aug. 3, of Sara Montgomery after her lengthy battle with cancer.

Sara was a colleague, leader and friend, and more, to so many.

A native of Camden and a graduate of Camden-Rockport High School and the University of New Hampshire, Sara followed her father, David Montgomery, into the insurance field, starting her career in 1978 with Hartford Insurance. Five years later, Sara came home to Camden to work with her dad at Allen.

As she honed her expertise and the company grew, Sara rose to the post of executive vice president, earning the respect of her colleagues and clients for her smart, friendly-yet-direct way of doing business. Sara was known for going out of her way to get a challenging job done right (and always with a smile).

Sara supervised the human resource, accounting, property, marketing and information technology aspects of our company. She also served the insurance needs of a large number of business clients.

Sara was a Camden Rotarian and a Paul Harris Fellow. She was involved in many charitable efforts in our community, most notably the American Cancer Society's Relay for Life, the Ragged Mountain Recreation Area Redevelopment, the Pen Bay Healthcare Foundation and United Mid-Coast Charities.

There is so much more to Sara than her list of accomplishments – she was about the people and places she loved, always making sure to express her love and appreciation for them.

A celebration of life is scheduled for Thursday, Aug. 22 at 3

p.m. at the Camden Snow Bowl.

Memorial gifts in her memory may be made to the Ragged Mountain Recreation Area Foundation, P.O. Box 438, Camden, ME 04843. Condolences and memories may be shared with the Montgomery family by visiting their book of memories at longfuneralhomecamden.com.

Jo-Ann Neal Joins Our Group Benefits Division

Jo-Ann Neal has joined Allen Insurance and Financial as an employee benefits account manager. She will be based in the company's offices on Chestnut Street in Camden.



Jo-Ann Neal

Jo-Ann brings 10 years of human resources and benefit administration experience to Allen; valuable experience as the company's benefits department works with businesses all over Maine at a time of great change for the way businesses administer health insurance for their employees.

"I'm happy to be part of the Allen team," said Jo-Ann. "Especially as the start of the Affordable Care Act moves closer, I'm learning new things and working to be a valued resource for Allen's clients when they need it most."

Jo-Ann and her husband Kelley, a contractor, live in Nobleboro. They have two grown daughters. Outside of work, Jo-Ann enjoys

camping with her husband as well as reading, quilting and making stained glass.

Michael Pierce Attends Financial Advisor Conference



Michael Pierce

Michael Pierce, president of Allen Insurance and Financial, joined a select group of financial advisors invited to participate in Commonwealth Financial Network®'s President's Club, June 18–23, 2013, at the Montage Deer Valley in Park City, Utah. Qualification is based on a ranking of annual production among Commonwealth's network of financial advisors.

Throughout the conference, a variety of business meetings and sponsor presentations allowed attendees to gain key insights and recommendations from industry leaders. Significant time was also dedicated to networking sessions. Overall, emphasis was placed on financial advisors' ability to provide the highest level of service and value to their client base.

“Attending this conference was extremely beneficial to my continued learning” said Pierce. “Through the formal sessions and networking opportunities that were offered, I gained knowledge that will help me manage my firm and better serve my clients.”

About Allen Insurance and Financial

Allen Insurance and Financial provides individuals and organizations with financial guidance. Located at 31 Chestnut St. in Camden, Maine, the advisors of Allen Insurance and Financial pride themselves on crafting unique strategies for each client. For more information, please visit www.allenfg.com. Securities and Advisory Services offered through Commonwealth Financial Network®, Member FINRA, SIPC, a Registered Investment Adviser. Fixed insurance products and services and employee benefit services offered by Allen Insurance and Financial are separate and unrelated to Commonwealth.

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, Massachusetts, and San Diego, California. J.D. Power and Associates ranks Commonwealth 'Highest in Independent Advisor Satisfaction among Financial Investment Firms, Three Times in a Row.' The firm supports more than 1,450 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.

Wyatt Lafreniere is Our Summer Intern

☒ Wyatt Lafreniere of Lincolnville is Allen Insurance and Financial's 2013 summer intern.

Lafreniere, a 2012 graduate of Camden Hills Regional High School, is double majoring in finance and resource economics at the University of Massachusetts' Isenberg School of Management in Amherst, Mass.

"My goal for my internship here at Allen Financial is to learn more about the business world – to just get a feel for how a business works and what I might be doing after I graduate. It is nice to see how what I am being taught in classes is applied in the real world with actual problems," said Lafreniere.

Allen Insurance and Financial's summer internship program allows a local high school graduate the opportunity to learn about each of the company's insurance and financial planning departments. Lafreniere's desk is based in the personal insurance department, where he is working with Account Executives Cale Pickford and Jennifer Coffin.

In the fall, Lafreniere plans to play club ultimate Frisbee and club soccer.