

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.

Recognition from Safeco for Excellent Performance



Stephanie Davis of Safeco Insurance and Tom Nanof of Peerless Insurance, visited Allen Insurance and Financial's Camden office recently to congratulate the company on being named a President's Award winner and member of the Safeco Premier Partner program. With them, at left, is Allen Insurance and Financial Executive Vice President Michael Dufour.

Allen Insurance and Financial has earned two top honors from Safeco Insurance® – the distinguished President's Award and membership in the Premier Partner program.

Approximately 200 agencies that sell Safeco Insurance in the United States earn the President's Award each year, which celebrates their success with Safeco. The Premier Partner distinction recognizes excellent performance as well, providing agencies with access to special programs designed to help grow their business while maintaining high standards of service for customers.

"President's Award and Premier Partner agencies are among the best independent insurance agencies that sell Safeco," said Matt Nickerson, president of Safeco Insurance. "These awards

celebrate the hard work, dedication and success of Allen Insurance and Financial as a loyal Safeco partner who works with us to be there when customers need us most.”

Lindsey Eaton Joins Our Camden Office Staff



Lindsey
Eaton

Lindsey Eaton of Hope has joined Allen Insurance and Financial as a scanning associate in the company’s Camden office.

A Camden native and graduate of Camden Hills Regional High School, Lindsey is new to the insurance industry and is studying for her Maine property & casualty license as part of the Allen Insurance and Financial in-house education program.

As a scanning associate, Lindsey plays a key role in Allen’s paperless office system. She also supports members of the administrative staff and reception in the Camden office.

“I enjoy the variety of tasks my job requires,” she said. “And I enjoy being part of the front desk team. I am people-person – I love interaction with others.”

Outside of work, Lindsey enjoys spending time with her young daughter, family and friends.

Anna Moorman Licensed for Life and Health Insurance

Anna Moorman, Voluntary Benefits Account Manager at Allen Insurance and Financial, has obtained her license to sell life and health insurance in the state of Maine.



Anna
Moorman

Moorman, a native of Thomaston, joined the company's Voluntary Benefits team in October 2012.

"Allen Insurance and Financial has such a rich history and serves as a mainstay in our community," said Moorman. "Being a member of the AIF team is like being a part of a huge family – and I have been welcomed with support unlike anything I've experienced in my career."

Moorman is a graduate of Georges Valley High School and the University of Southern Maine (magna cum laude). She holds a Master Certificate in Project Management from the University of New England.

"I love helping people and solving problems," she said. "In my role as an account manager I will have many opportunities to help our clients through difficult times, which is what they count on us for."

Moorman lives in her hometown with her husband Ken and their son Carter. Outside of work, she enjoys spending time with friends and family. Most Sundays you will find her in the kitchen,

cooking – her favorite hobby.

Mallory Follett Presents to Camden Club About Her Rotary Leadership Experience

Earlier this week Mallory Follett, a commercial insurance processor in our Camden office, gave a presentation to the Camden Rotary Club about her experience with the Rotary Young Leadership Awards program. Says Mallory: “I was very nervous at first, but once I looked up and saw some familiar, and all smiling faces, my nerves were calmed. I felt pretty good about my presentation after all was said and done.”



“RYLA means something different for everyone. For me, RYLA was an eye opening experience that got me out of my comfort zone, and thinking about my role not only in the community, but the world.

“I admit, I was apprehensive at first, but once I arrived and saw all the smiling faces, I knew it would be an unforgettable weekend.

“RYLA helps you to discover your true potential and develop the skills needed to be a positive and effective leader in your community, career, and everyday life.

“Through RYLA I developed stronger teambuilding and leadership skills, as well as self esteem and self confidence.

“I learned that if you establish a goal and take steps towards accomplishing that goal, anything is possible. I also learned that being a leader includes being a follower, a listener, a volunteer, even a friend. I know that I would not be the person and leader I am today if it had not been for my experience at RYLA.

“I can honestly say that I learned more in one weekend at RYLA than I ever expected. I encourage people to become more familiar with RYLA and what it really is. In a world of clichés, we hear the phrase “life-changing experience” far too often, but RYLA really is.”

Welcoming Cale Pickford



Cale
Pickford

Cale Pickford has joined Allen Insurance and Financial as a

personal and commercial insurance specialist. He will be based in the company's Camden office.

Previously he held a similar position with Atlantic Insurance and Benefits in Belfast.

Cale is a graduate of Mt. View High School in Thorndike and of Hamilton College in Clinton, N.Y. Prior to his insurance industry experience, Pickford worked in the securities industry in New York City and in advertising and sales in both New York and St. Thomas, USVI.

Cale and his wife Marisa decided to raise their family in Midcoast Maine, where he grew up. They live in Lincolnville with their two young children.

He is active with area youth sports and the Belfast Area Chamber of Commerce and he is a member of the board of directors at Peopleplace Cooperative Preschool in Rockport.