

Tom Chester now a **CERTIFIED FINANCIAL PLANNER™** Professional



Thomas C.
Chester, CFP®,
AIF®, CPFA®

Thomas C. Chester, financial advisor at Allen Insurance and Financial, has achieved the designation of CERTIFIED FINANCIAL PLANNER™ Professional.

The CFP® designation has become the most recognized in the financial planning community. Requirements include meeting stringent education and experience standards and a rigorous 10-hour exam. Chester joins his colleague Michael Pierce as the second CFP® on the Allen Insurance and Financial staff.

Chester, of Lincolnville, graduated from the University of Massachusetts-Lowell with a bachelor of science in business administration and a concentration in marketing. Before joining the Allen Insurance and Financial, he was a financial advisor at Bancnorth Investment Planning's local office. His previous work

experience includes Eaton Vance Wealth Management in Boston.

He has expertise in the fields of life and health insurance and is an Investment Adviser Representative of Commonwealth Financial Network, a Registered Investment Adviser.

He is a past officer at the Camden-Rockport-Lincolnville Chamber of Commerce, past president of the West Bay Rotary Club and a past trustee for the Watershed Community School.

Allen Insurance and Financial Welcomes Theresa A. Kavanagh

Theresa A. Kavanagh of Owls Head has joined Allen Insurance and Financial as a group benefits associate.



Based in the company's Chestnut Street office in Camden, Kavanagh will be working with Allen's group benefit specialists to serve clients all over Maine.

A native of Vermilion, Ohio, Kavanagh is a graduate of Denison University, where she received a bachelor's degree in mathematics. After college, she sailed along the eastern seaboard and in Europe and the Caribbean. She settled in the Midcoast nine years ago; she was previously administration director at VillageSoup.

Outside of work, Kavanagh splits her time between gardening and working with her husband John to convert the former City of Portland fireboat to a live-aboard cruiser.

"I am thrilled to join Allen Insurance and Financial and become part of a team of professional and well-respected community members," she said.

Sherree Craig Recognized by International Society of Certified Employee Benefit Specialists

 Sherree L. Craig, CEBS

Sherree L. Craig, CEBS, Insured Benefits Manager at Allen Insurance and Financial, has been awarded Fellowship standing in the International Society of Certified Employee Benefit Specialists for a two-year period.

Craig earned this distinction by successfully completing a national employee benefits continuing education exam developed by the Wharton School of the University of Pennsylvania.

The International Society of Certified Employee Benefit Specialists is an educational association dedicated to serving the professional development needs of those holding the Certified Employee Benefit Specialist designation. Craig earned her CEBS designation in 2004.

Craig is also a board member of the Maine Association of Health Underwriters and Rockland Rotary. Call Sherree at 230-5840.

Jean Dutch Promoted to Senior Operations Manager

Allen Insurance and Financial has promoted Jean Dutch of Belfast to senior operations manager.



Jean Dutch,
CIC

In her new role, Dutch will be in charge of processes and training throughout the company, and at all locations, in Camden, Rockland and Saco. She was previously head of operations for the Allen Insurance property & casualty divisions.

Dutch has more than 25 years experience in the insurance industry. She holds the Certified Insurance Counselor designation from the Society of Certified Insurance Counselors, the nation's leading continuing education for insurance professionals.

"We are so pleased to have Jean in this newly-created position. Her experience, enthusiasm and attention to detail are vital to both our day-to-day operations and our planning for continued success in the long-term," said Gil Fifield, company president. Dutch lives in Belfast with her husband Tim. She is based at Allen Insurance and Financial's Camden location.

Joella Rossignol Honored with Award of Excellence by Safeco® Insurance

Joella Rossignol of 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 is a very personal award designed to recognize the most committed, loyal agents,” said Gil Fifield, president of Allen Insurance and Financial. “It is given to someone who understands, with extraordinary attention to detail, both the needs of her clients and the needs of the insurance company she is working with. This award recognizes expertise, trust and respect. Joella has all of these qualities and she richly deserves this award.”

The Award of Excellence celebrates those individuals with superior underwriting skills who have developed a solid underwriting partnership with Safeco and have qualified for membership in Safeco’s H.K. Dent Society, the company’s elite agency recognition program. Agents who earn this prestigious designation will have the ability to make selected underwriting decisions, attend an awards ceremony and receive a recognition gift.

“Underwriting – assessing an insurance risk and then determining the right amount of premium to charge – can be challenging. You want to make sure individuals and families are properly insured at a fair price,” said Rob Jacobson, Safeco personal lines zone

underwriting manager. “The Award of Excellence is a wonderful way to recognize great agencies that help us hit the mark every time for our customers.”

Rossignol joined Allen Insurance and Financial in 1999. A native of Island Falls, she grew up in Belfast and now lives in Monroe. She is a Certified Insurance Counselor (CIC), a designation showing commitment to continuing education in her field. She works in the company’s personal insurance division.

About Safeco

In business since 1923 and based in Seattle, Washington, Safeco sells insurance to drivers and homeowners through a network of independent agents and brokers in eight regions throughout the United States.

Safeco is part of Liberty Mutual Agency Markets, a business unit of Liberty Mutual Group, consisting of property and casualty and specialty insurance carriers that distribute their products and services primarily through independent agents and brokers. Liberty Mutual Group ranks 71st on the Fortune 500 list of the largest U.S. corporations based on 2009 revenues.

Samantha Cloutier: Taking a Career to the Next Level



Samantha
Cloutier

Allen Insurance and Financial is pleased to announce the promotion of Samantha Cloutier of Rockland from receptionist to business insurance processor in the company's Camden office.

Sam joined Allen Insurance and Financial in December 2008.

Since then, in addition to her role as receptionist at the Camden office front desk, she has worked with the office's business insurance team, known as the commercial lines group.

"Sam has made a real effort to participate in the education Allen Insurance and Financial offers our new employees," said Jean Dutch, the company's commercial lines operations manager. "We're pleased to see her take her career with us to the next level."

Sam is a graduate of Rockland District High School. In her spare time, she enjoys snowboarding, reading, and spending time with her two dogs.

**Allen Financial's Sherree L.
Craig Earns Fellowship**

Standing in the International Society of Certified Employee Benefit Specialists



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Craig is also a board member of the Maine Association of Health Underwriters and Rockland Rotary.

Two from Allen Financial Receive Rotary Honor

Peter Van Alstine and Scott Fletcher of Allen Financial Group were recently named Paul Harris Fellows through their membership in the Camden Rotary Club.

✖ The Paul Harris Fellow recognition was created in memory of Paul Harris, the founder of Rotary. It is the practice of many clubs to award Paul Harris Fellowship to select members in appreciation of his or her service to the club.

“Service to our local community – and through Rotary, to the world community – is important to us,” said Gil Fifield, president of Allen Insurance and Financial and a long-time member of the Rockland Rotary. “We congratulate Peter and Scott and their families on this important honor.”

Van Alstine, right, and Fletcher, left, join a number of ✖ their Allen Insurance and Financial colleagues as Paul Harris Fellows. Allen, the employee-owned insurance and financial services company based in Camden, maintains a strong relationship with Knox County Rotary Clubs and can claim members in each of the area clubs: Camden, Rockland and West Bay. Twenty percent of the Allen Agency’s 60 employees are Rotarians; members attend Rotary functions on company time.

Both Peter and Scott are financial advisors with Allen Financial Group. Scott is a Certified Financial Planner. Peter is a Certified Public Accountant.

Rotary International is an organization is 32,000 service clubs and 1.2 million members worldwide, bringing together business and professional leaders to provide humanitarian service and to build goodwill and peace in the world. Members meet weekly for breakfast, lunch or dinner. Meetings are social events as well as opportunities to organize work for their service goals.

Rotary was founded in Chicago in 1905 and is headquartered today

in Evanston, Ill. Rotary's flagship program is the eradication of polio. Other programs focus on issues of hunger, poverty, and illiteracy.