

Allen Insurance and Financial Earns Diamond Achiever Award in Maine

Allen Insurance and Financial has been named Maine's 2020 Diamond Achiever by [Patriot Insurance](#) Company. The annual award is presented to the highest performing agency based on set criteria including length of appointment, profitability, growth, and policy retention. Each year, the top Patriot Insurance Company agencies receive the "Diamond Achiever" award in recognition of their outstanding accomplishment.

Patriot Insurance Company President and CEO, Lincoln Merrill Jr. explains, "We are proud to present Allen Insurance and Financial with our Diamond Achiever award. Through their hard work and commitment to providing superior services, support and products, it is well deserved."

This recognition exemplifies their commitment to providing quality, professional insurance products and services to our mutual clients.

The results achieved by the team at Allen Insurance and Financial helped the agency become one of the most successful among Patriot Insurance Company's more than 115 independent agencies.

"The team at Allen Insurance and Financial is dedicated to providing the protection our clients need accompanied by the highest level of service. We are all very proud to be recognized by our colleagues at Patriot Insurance. Strong partnerships like ours benefit everyone in the industry – carriers, agents and clients, " said Michael Dufour, executive vice president of

Allen Insurance and Financial.

Allen Insurance and Financial has been licensed with Patriot Insurance Company since 1993 is recognized as one of the carrier's Preferred independent insurance agency partners.

About Patriot Insurance

Patriot Insurance has been providing peace of mind for families and businesses in New England for over 50 years. Headquartered in Yarmouth, Maine, we are a regional carrier offering business, home, auto, life, and surety products backed by local, autonomous claims, loss control, and underwriting teams.

We work exclusively with independent agents who can give our customers the personal guidance and service they deserve. Since 2007, we have partnered with Frankenmuth Insurance, a longstanding company founded in Michigan in 1868. Patriot Insurance is financially sound, with an A.M. Best rating of "A" (Excellent).

Meesha Luce Earns CPIA Designation

[Meesha Luce, ACSR](#), a member of the personal insurance team at Allen Insurance and Financial, has earned the Certified Professional Insurance agent designation from the American Insurance Marketing and Sales Society.

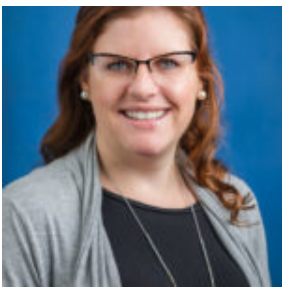
The CPIA designation emphasizes critical skills in insurance underwriting, coverages marketing and client services.

Meesha is a member of the MIAA Young Agent Committee, and was named Maine's Young Agent of the Year in 2017. She joined Allen Insurance and Financial in 2006.

She also holds an Accredited Customer Service representative (ACSR) designation. A graduate of Medomak Valley High School, Luce lives in Hope.

"All of us here at Allen are incredibly proud of Meesha's professionalism and commitment to both customers and community," said Scott Carlson, personal insurance division manager at Allen Insurance and Financial. "Meesha is a real embodiment of our company's values."

Anna Moorman Recognized by Anthem for Medicare Sales



Anna Moorman

[Anna Moorman](#) has been recognized for Medicare supplement sales in 2020 by Anthem, one of the largest Medicare supplement carriers in the state of Maine.

Anna is one of two agents at Allen Insurance and Financial who

specialize in the complex market of Medicare insurance, working with a number of insurance carriers to give customers a range of choices to suit their needs. Moorman has been with Allen Insurance and Financial since 2012.

This is the sixth consecutive year that Moorman has received an award from Anthem for Medicare sales; for 2020 she was named one of Anthem's top 20 sales leaders in Maine.

Anna and her colleague [Jo-Ann Neal](#) have a goal of simplifying the process of enrolling in a Medicare supplement plan, by providing dedicated, one-on-one attention to their customers, assessing each person's needs and finding options that will align with their budget and healthcare goals.

More information about Allen Insurance and Financial's Medicare-related services: AllenIF.com/Medicare

A Day of Service in the Community: Doing Things That Need to be Done

Allen Insurance and Financial encouraged employees to use a paid community service day on Jan. 18. Amy Bowen and Sally Miles, members of the business insurance team in our Belfast office, put in some real elbow grease, volunteering for [Waldo Community Action Partners](#) in Belfast, assembling 20 conference room chairs and deep cleaning two of the organization's transport vans.

Says Sally: "It was a great day – we did things that needed to

be done!”

MLK Day Food and Funds Drive an Incredible Demonstration of Community Spirit!



How do you find the words to describe an event where teamwork, generosity and community all come together to exceed a goal three times over? That’s what happened on Monday, Jan. 18, when a group of Allen employee-owners from our Camden and Rockland offices joined AIO Food and Energy Assistance’s team of volunteers at The Strand Theatre in Rockland, which hosted the event. Together we assisted in collecting food and funds in support of AIO’s Food Assistance, Energy Assistance and Weekend Meal programs.

In all, 2,219 pounds of food and \$24,502 were collected. AIO's original goal of filling the seats in the Strand was exceeded by three times, with a total of 1,128 seats filled – each with a bag of food. (And the original funds goal of \$10,000 was shattered, too!)

It was a day of community, connection and joy and a great way to celebrate Martin Luther King Day in Rockland.

We're truly grateful for

- All who donated food and funds.
- Our fellow volunteers from AIO and The Strand.
- AIO for stellar event organization and for the opportunity to participate in this special event.
- The Strand for a warm, welcoming venue.
- Main Street Markets in Rockland, for being a food collection site and rolling a huge cart of donations down Main Street from the market to the Strand.
- Photographers Tara Rice, Leila Murphy and Dan Bookham for these photos we can share with you.

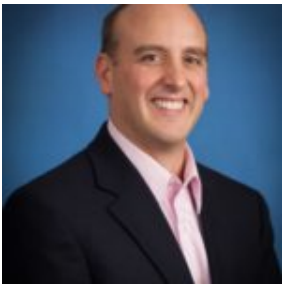
Supporting a Waldo County YMCA Food Drive

When the call came in from the [Waldo County YMCA](#) in December 2020 about a food drive to help fill food pantries at schools in the county, our six-member Belfast office team leapt into action and as of Friday, Jan. 15, together had raised a total of \$825 in cash donations, which includes donations from the entire

office as well as additional contributions from a number of fellow employee-owners and a partial company match in the form of Hannaford gift cards.

Shown here are, from left, are Libby Davis, Amy Bowen and Joella Rossignol, with just some of the groceries Amy was able to buy with those funds.

Tom Chester Earns CPFA Designation



Thomas C.
Chester, CFP™,
AIF®, CPFA

Thomas C. Chester, a financial advisor at Allen Financial in Camden, has earned the designation of Certified Plan Fiduciary Advisor from the National Association of Plan Advisors.

The Certified Plan Fiduciary Advisor (CPFA) credential – developed by some of the nation's leading advisors and retirement plan experts – demonstrates knowledge, expertise and commitment to working with retirement plans.

Plan advisors who earn their CPFA demonstrate the expertise required to act as a plan fiduciary or help plan fiduciaries manage their roles and responsibilities.

Chester has been with Allen Financial since 2005. He has FINRA Series 6, 7, 63, and 66 registrations and he is a CERTIFIED FINANCIAL PLANNER™ Professional and Accredited Investment Fiduciary®.

Meesha Luce Earns Safeco Insurance® Award of Excellence for Superior Underwriting Skill



Meesha Luce

Meesha Luce, ACSR, a personal insurance account executive with Allen Insurance and Financial has earned the Safeco Insurance Award of Excellence, an honor recognizing superior underwriting skill.

This is Luce's sixth consecutive year earning this recognition,

which is achieved only by a select group of agents across the country who sell Safeco Insurance.

“Meesha is part of a personal insurance team working hard every day to make sure we deliver the highest level of service to our customers. We are all very proud to say that Meesha is again part of this elite group of insurance agents honored by Safeco,” said Michael Pierce, president of Allen Insurance and Financial.

The Safeco Award of Excellence 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. Fewer than 10% of agencies who sell Safeco have agents who receive this award.

Luce, a resident of Jefferson, joined Allen Insurance and Financial in 2006. She has been a member of the Maine Insurance Agents Association Young Agents Committee since 2013, was named Maine’s Young Professional of the Year in 2017 and is the vice chairman of the Maine Young Agents Committee.

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.

Sally Carlisle Completes 12-

Week Class on “Aquaculture in Shared Waters”



Sally Carlisle

Sally Carlisle of Allen Insurance and Financial has completed the 12-week class “Aquaculture in Shared Waters,” offered earlier this year by Coastal Enterprises.

Carlisle, a member of the business insurance team and based in the company’s Belfast office. The class was offered at locations in Brunswick and Belfast, with the final four classes offered via video conference.

Topics included site selection; shellfish biology; marketing, sales and logistics; equipment and husbandry and public health and biosecurity. Presenters included representatives of the Maine department of Marine resources, the Maine Aquaculture Association, the Maine Aquaculture Innovation Center, Coastal Enterprises, UMaine’s Sea Grant program and the U.S. Army Corps of Engineers.

“Continuing education is an important part of all aspects of the insurance industry,” said Carlisle. “This class offered a unique opportunity to learn about what is and will continue to be one of our state’s burgeoning industries.”

Anna Moorman Recognized for 2019 Sales



Anna Moorman

Anna Moorman of Allen Insurance and Financial has been recognized for Medicare supplement sales in 2019 by Anthem, one of the largest Medicare supplement carriers in the state of Maine.

Moorman is one of two agents at Allen Insurance and Financial who specialize in the complex market of Medicare insurance, working with a number of insurance carriers to give customers a range of choices to suit their needs. Moorman has been with Allen Insurance and Financial since 2012.

The Anthem award was announced in Portland on Feb. 25. This is the fifth consecutive year that Moorman has received an award from Anthem for Medicare sales; for 2019 she was named one of Anthem's top 10 sales leaders.

"This award indicates that Anna's clients appreciate the way she simplifies the process," said Michael Pierce, company president. "And that's key, because our goal is to provide dedicated, one-

on-one attention to our Medicare customers, assessing each person's needs and finding options that will align with their budget and healthcare goals."