

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."

Sarah Ruef-Lindquist is President at Maine Planned Giving Council



Sarah Ruef-Lindquist, JD, CTFA

Sarah Ruef-Lindquist, JD, CTFA will be serving as president of the Maine Planned Giving Council in 2020.

A financial advisor and wealth manager at Allen Financial in Camden, Ruef-Lindquist has been a council board member for most of the past 20 years, and is a regular presenter at the council's annual fall conference.

Ruef-Lindquist has had a role in planned giving as an attorney, former trust officer and philanthropic advisor and consultant to non-profits across New England. She previously served as vice president for Southern Maine of the Maine Community Foundation, Senior Administrative Trust Officer at Union Trust Company, Senior Consultant and founder of Planning for Good and CEO of

the Maine Women's Fund.

A trustee of Unity College and director of Rockland Savings Bank, Ruef-Lindquist has presented for the Maine State Bar Association, Association of Fundraising Professionals and Planned Giving Group of New England. She is licensed to practice law in Maine and New Hampshire, and resides in Camden.

Ruef-Lindquist succeeds David Warren, planned giving and major gifts officer at Maine Coast Heritage Trust, as MPGC president. She previously served as president in 2006 and 2007.

"The unprecedented intergenerational transfer of wealth taking place at this time presents tremendous opportunities for organizations to have meaningful conversations with their donors about where their estate and financial planning intersects with their philanthropic passions. Our goal is to see to it that those conversations can take place." said Ruef-Lindquist.

Founded in 1995, the Maine Planned Giving Council (MPGC) is a statewide, independent, non-profit organization created to encourage charitable giving in Maine through planned giving. The MPGC defines planned giving as any deferred or current charitable gift where the donor's objectives and circumstances are fully considered in order to provide maximum benefit to both the donor and the charity.

Kellie Doolen Joins Allen

Insurance and Financial



Kellie Doolen

Allen Insurance and Financial is pleased to announce that Kellie Doolen of Lincolnville has joined the company as a scanning associate and receptionist.

A native of Houlton, Doolen is a graduate of the University of Maine and brings 15+ years of retail management and customer service experience to Allen Insurance and Financial. She is based in the company's Camden office.

Sherree L. Craig Now Licensed as an Insurance Consultant in Maine



Sherree L.
Craig, CEBS

Sherree L. Craig, CEBS, Senior Account Executive in the Benefits Division at Allen Insurance and Financial, is now a licensed insurance consultant in Maine.

“Sherree’s efforts demonstrate her deep commitment to continuing professional development,” said Mike Pierce, company president. “This commitment is important to all of our insurance divisions but it is especially so in the always-changing field of employee benefits.”

Craig holds Fellowship standing in the International Society of Certified Employee Benefit Specialists through the Wharton School of Business, and an advanced certification in self-funding from the National Association of Health Underwriters.

Patrick Chamberlin Earns a Management Liability Insurance Specialist Designation



Allen Insurance and Financial is pleased to announce that Patrick Chamberlin has earned a Management Liability Insurance Specialist designation from the International Risk Management Institute.

Chamberlin is a business insurance producer in the company's Camden office.

This insurance certification recognizes specialized expertise in the fundamentals of professional liability insurance and the more specific nuances of directors and officers liability, employment practices liability and fiduciary liability exposures and insurance.

Cameron Gartley Earns AAI Designation



Cameron Gartley

Allen Insurance and Financial is pleased to announce that Cameron Gartley has earned an Accredited Adviser in Insurance designation from the American Institute for Chartered Property Casualty Underwriters.

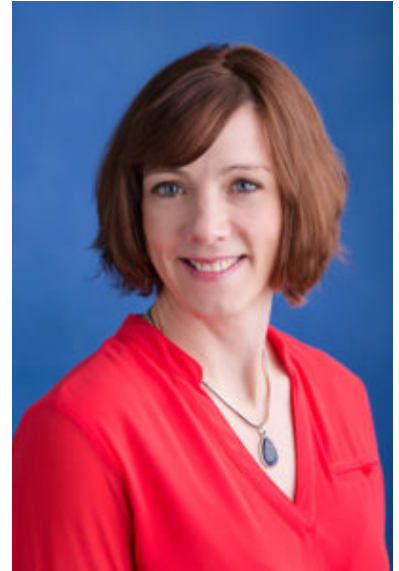
Gartley is a personal insurance account executive in the company's Camden office.

Designations such as AAI demonstrate an insurance broker's tested knowledge in their field. Allen Insurance and Financial supports all its employees in their efforts to continue their education.

The AAI program requires nine separate exams; the course outlines risk analysis techniques and tools, while providing an in-depth understanding of commercial insurance products and services.

Amanda Corson Earns CIC Designation

Amanda Corson, a personal insurance account executive with LS. Robinson Co.



Amanda Corson

insurance, has earned the designation of Certified Insurance Counselor.

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

“Amanda’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 Michael Pierce, company president.

A Bar Harbor native, Corson is a graduate of MDI High School and the University of Maine in Orono. She also holds the ACSR (Accredited Customer Service Representative) and AAI (Accredited Advisor in Insurance) designations.