

Meesha Luce Recognized for Excellence by Safeco Insurance®



Meesha Luce

Meesha Luce, a personal insurance account executive with Allen Insurance and Financial 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. This is Luce's fifth consecutive year earning this recognition.

"We are very proud to say that Meesha is again part of this elite group of insurance agents," 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.

Luce, a resident of Jefferson, joined Allen Insurance and Financial in 2006. In 2013 she earned her Accredited Customer Service Representative designation. 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. She is based in the agency's Rockland office.

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.

Patrick Chamberlin Joins Our Business Insurance Team



Patrick Chamberlin

Patrick Chamberlin has joined Allen Insurance and Financial as a commercial insurance producer.

Chamberlin has five years experience in property & casualty

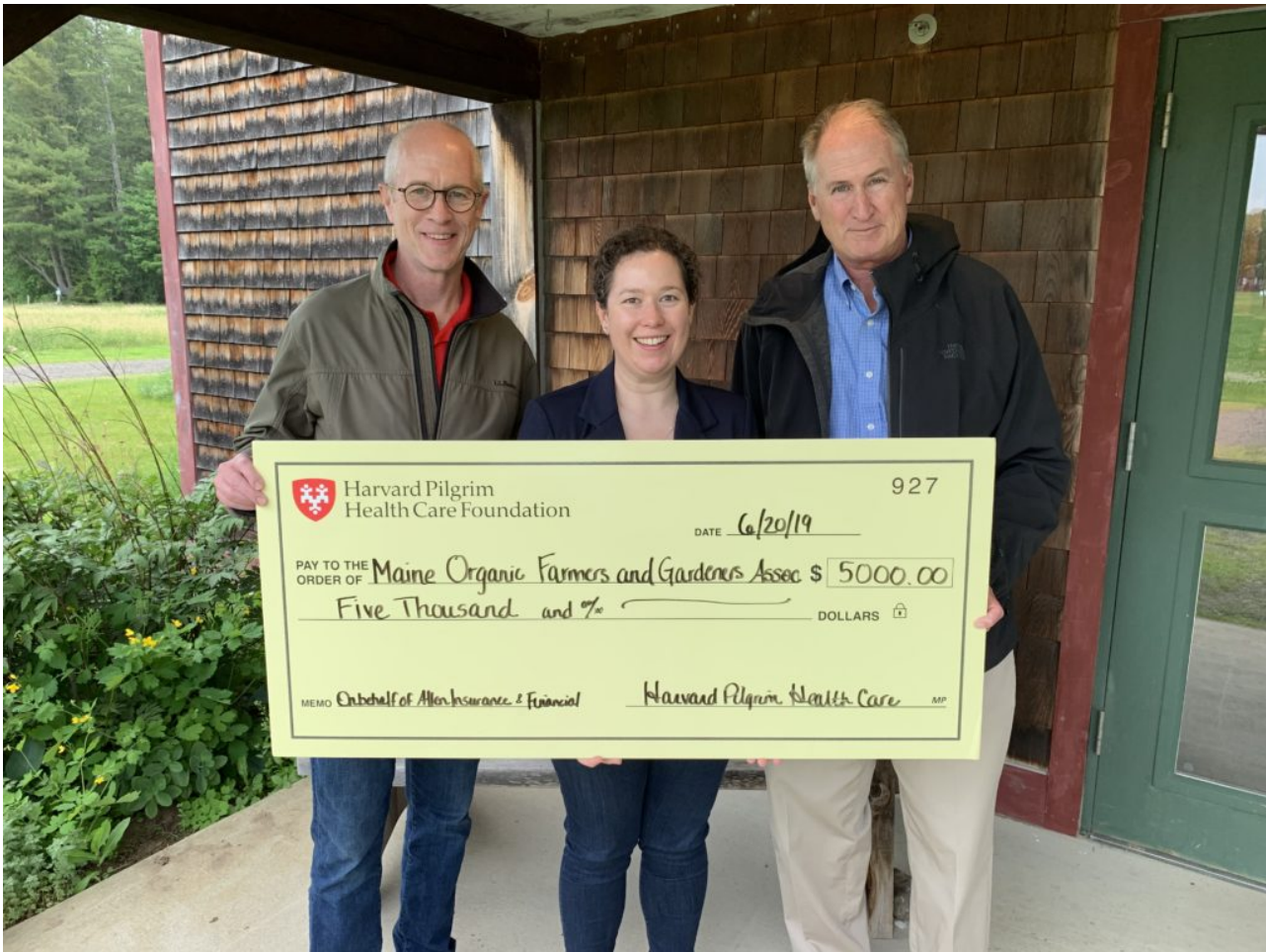
insurance and holds the Commercial Lines Coverage Specialist designation.

A native of Thomaston, he has an associate degree in criminal justice from Husson University. Before he became an insurance professional, Chamberlin spent 12 years working as a commercial fisherman.

Chamberlin lives in Rockland. Outside of work, he enjoys hiking, skiing and spending time with his fiancé and their bulldog, Blu.

MOFGA Receives Grant from Harvard Pilgrim Health Care and Allen Insurance and Financial

The Maine Organic Farmers and Gardeners Association (MOFGA) recently received a \$5,000 grant from Harvard Pilgrim Health Care Foundation and Allen Insurance and Financial to increase access to and affordability of healthy, nutritious food for low income families. MOGFA has a longstanding commitment to help all Maine people acquire local, organic foods regardless of geography or income. Pictured in the photo, left to right, are: Bill Whitmore, Maine Market Vice President, Harvard Pilgrim Health Care; Sarah Alexander, Executive Director, Maine Organic Farmers and Gardeners Association; and Dan Wyman, JD, Insured Benefits Manager, Allen Insurance and Financial.



Meet Our Summer Interns



From left: Jack Gallagher

and Daulton Wickenden

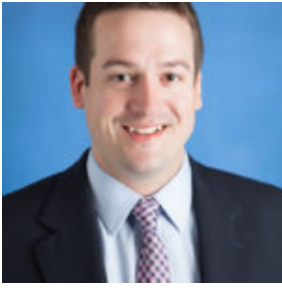
Allen Insurance and Financial is hosting two summer interns in 2019. Both are graduates of Camden Hills Regional High School and attend colleges in Maine.

Jack Gallagher of Camden is a graduate of Thomas College in Waterville and will be working in both the insurance and financial divisions at Allen Insurance and Financial before returning to Thomas this fall to study for his MBA.

Daulton Wickenden of Rockport, who will be a fall 2019 graduate of Husson University, is focused more exclusively in the company's personal insurance division.

"These internships will provide a complete immersion into the nature of our work at Allen Insurance and Financial," said company president Mike Pierce. "Jack and Daulton will have the opportunity to put their academic experience to work to complete a variety of business assignments. We look forward to working with them this summer."

**Allen Financial Featured
Speakers at Maine Land Trust
Network Conference**

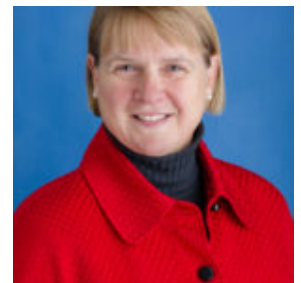


Abraham Dugal

Allen Financial advisors and wealth managers Abraham Dugal and Sarah Ruef-Lindquist, JD, CTFA, were speakers for a session at the Maine Land Trust Network's day-long Land Conservation Conference held earlier this spring in Topsham at the Middle School.

Dugal and Ruef-Lindquist spoke about issues surrounding how to grow endowments through planned giving, when donors seek to provide long-term support through gifts that can be more complex than cash or marketable securities.

Land trust staff and board members gather annually for the opportunity to network, share organizational best-practices and learn from experts in fields that include conservation, land preservation, marketing and finance. It is produced by the Maine Coast Heritage Trust.

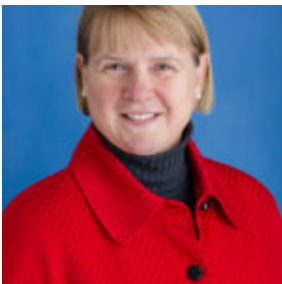


Sarah Ruef-Lindquist, JD, CTFA

Dugal and Ruef-Lindquist spoke about the policy foundations and recognition practices they view as necessary to have fiscally-sound and successful planned giving programs. Their backgrounds – hers as an attorney, financial and philanthropic advisor, trust officer; his as an investment manager and both as board members – contribute to their unique perspectives as advisors and fiduciaries and how they approach potential gifts through clients' estate and financial planning.

Given the unprecedented intergenerational transfer of wealth taking place in the United States, and the projections for gifts to non-profit organizations during the next 30 to 40 years in the trillions of dollars, organizations are well-served to pay greater attention to this area of resource development to build their long-term financial sustainability.

Ruef-Lindquist Featured Speaker at Mount Desert Island Nonprofit Alliance



Sarah Ruef-Lindquist, JD,

CTFA

Allen Financial advisor and wealth manager Sarah Ruef-Lindquist, JD, CTFA, was the featured speaker at the June monthly meeting of the Mount Desert Island Nonprofit Alliance at the Garland Farm. MDINA members work collaboratively to address operational issues and coordinate event schedules for the many Mount Desert Island non-profit organizations.

Participant groups who were represented at the meeting included the Schoodic Institute, Friends of Acadia, Seal Cove Auto Museum, MDI Hospital, Abbe Museum and Jessup Memorial Library.

After a brief tour and background presentation from Garland Farm personnel, Ruef-Lindquist spoke about the policy foundations, recognition practices and outreach necessary to have fiscally-sound and successful planned giving programs and endowment funds. Members submitted questions in advance of the meeting ranging from how to begin a planned giving program to how to begin a conversation with a donor about planned giving.

Given the unprecedented intergenerational transfer of wealth taking place in the United States, and the projections for gifts to non-profit organizations during the next 30 to 40 years in the trillions of dollars, organizations would be well-served to pay greater attention to this area of resource development to build their long-term financial sustainability, Ruef-Lindquist said. It is an area in which she has worked as a consultant, philanthropic advisor or trust officer for more than 20 years.

Anthem Recognizes Anna Moorman for 2018 Sales



Anna Moorman

Anna Moorman of Allen Insurance and Financial has received the Silver Award for Medicare Sales for her work with Anthem in 2018. Moorman placed eighth out of 181 brokers for top sales and seventh for Medicare Supplement Sales in the State of Maine.

Moorman has been with Allen Insurance and Financial for more than six years and is one of two agents at the company who specialize in the complex market of Medicare insurance. She works with a number of insurance carriers to give customers a range of choices to suit their needs.

The Anthem award was announced in Portland on May 1. This is the fourth consecutive year that Moorman has received an award from Anthem for Medicare sales.

“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,” said Michael Pierce, company president. “I know Anna enjoys helping clients navigate the Medicare maze and as this award indicates her clients appreciate the way she simplifies the process.”

Welcoming Nikki Castellano



Nikki
Castellano

Nikki Castellano has joined Allen Insurance and Financial as an assistant in the company's benefits division.

A native of Pleasant Valley, N.Y. and graduate of Newbury College in Boston, Castellano's work supports the Allen Insurance benefits division staff at their Chestnut Street location in Camden.

Castellano lives in Camden with her husband and their two sons. Outside of work, she is active in her community, currently serving as the marketing and fundraising coordinator for Megunticook Rowing, a Camden organization in which her sons are active. An interior designer in Boston, London and San Francisco for 12 years, Castellano is also a crafter/artist with a focus on use of recycled items.

Jane Harford Earns State

Insurance License



Jane Harford

We are pleased to announce that Jane Harford has obtained a license to sell property and casualty insurance in the state of Maine.

Jane is a member of the support staff at the agency's Camden office. A resident of Belfast, she joined the company in 2018.

The state-issued study guide for insurance licensing is 400+ pages. The state exams are comprised of 150 questions drawn from a pool of 2,400 questions on a complete range of subject areas, including business and personal insurance, workers' compensation, maritime insurance and Maine insurance law.

Welcoming New Employee Jane Harford



Jane

Harford

Jane Harford has joined Allen Insurance and Financial as a receptionist based in the company's Camden office.

A native of Belfast, Jane brings with her more than two decades of experience in customer service at Bank of America.

Jane lives in Swanville with her husband Steve. Outside of work, she leads the children's ministry at her church which lately has involved remodeling the Sunday School room. In addition, she enjoys spending time with her extended family, including three grandchildren.