DISTRIBUTION

WLC

WOMEN'S LEADERSHIP COUNCIL

AMERILIFE

WHO WE ARE

The Distribution Women's Leadership Council (DWLC) is committed to the recruitment, retention, advancement, and empowerment of professionals across AmeriLife's Distribution network. By fostering a dynamic forum grounded in best practices, mentorship, and sponsorship, the council aims to unlock market opportunities and accelerate the achievement of Distribution's business objectives.

Founded to celebrate and elevate women in insurance and financial services, the DWLC serves as a catalyst for cultivating future leaders. Through its focus on inclusive development, the council strives to create equitable pathways for personal and professional growth—championing diversity, fostering inclusion, and driving advancement for professionals across the industry.

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EVERY WOMAN ON THE COUNCIL LEADS BY EXAMPLE TO EXEMPLIFY OUR CORE VALUES:

HONESTY is truly our policy. We believe in dealing forthrightly with all customers all the time and treating them the way we want to be treated.

INTEGRITY strengthens the relationships we have with our customers, our carrier partners, and our co-workers. It means we do the right thing, even when no one else is around. Integrity is a moral compass that guides us.

ACCOUNTABILITY — as opposed to assigning blame or passing the buck — means we take ownership for our actions. We are responsible for outcomes and results, the good and the bad.

EXCELLENCE means we pursue the highest standards in everything we do. We are committed to delivering outstanding results, not just meeting expectations but exceeding them with consistency and care. When we strive for excellence, others know they can depend on us.

COURAGE at AmeriLife means being prepared, stepping up when needed and contributing to meetings and discussions.

MEET OUR DWLC ADVISORY COUNCIL

KIM BARTON

MCC Brokerage

- kbarton@mccbrokerage.com
- Tampa, FL
- Medicare Advantage

Kim Barton is the Vice President of Operations at MCC Brokerage, bringing over a decade of experience in the financial services industry. She joined MCC in 2019 as a Commissions and Accounting Specialist and rose quickly to Director of Operations by 2021 before being promoted to her current role. Kim's diverse background spans customer service, social media, and senior management, reflecting her versatility and operational expertise. Her commitment to professional growth is displayed by her licensure as an insurance broker in 2020, further enhancing her ability to serve MCC's downlines. Kim is committed to creating a positive and supportive workplace culture where team members are inspired to uplift one another, leading MCC forward through her transparent and collaborative leadership.

Kim earned an Associate of Science degree in Mathematics & Science from SUNY Jamestown and a Bachelor of Business Administration in Economics and Management from Kent State University. Kim enjoys spending time with her family, traveling, cooking and entertaining friends.

BOARD OF ADVISORS

AMBER BUBP

AmeriLife Marketing Group

- amallen @agentconnection.net
- Clearwater, FL; *active licensed agent in FL, MI, SC, TX, VA*
- Medicare Advantage, Life

Amber is a seasoned professional in the realm of healthcare marketing, currently serving as the Senior Marketing Director at AmeriLife Marketing Group. With a tenure dating back to 2015, she has been instrumental in shaping the company's strategies and initiatives.

Amber's journey within the healthcare sector began with a focus on Medicare Advantage at AmeriLife, where she delved deep into understanding the intricacies of various carriers, their plans, and contracting processes. Prior to joining AmeriLife, her experience in handling claims and authorizations for oral surgeons under Medicare and Medicaid laid a robust foundation for her career. Over five years of meticulous work in this domain honed her skills and instilled in her a profound understanding of the healthcare landscape.

Beyond her professional endeavors, Amber finds joy and fulfillment in her personal life. She exchanged vows in marriage in 2021, embarking on a new chapter of her life. This union was further blessed with the arrival of two precious little boys, marking a momentous milestone that brings her boundless happiness and fulfillment.

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DWLC ADVISORY COUNCIL

CRYSTAL POE

Southern Life Insurance Group

- cpoe@southernlifeins.com
- LaGrange, GA; *active licensed agent in GA, AL, SC, TN, VA, MI*
- Annuities, Final Expense, Medicare

Since May 2013, Crystal Poe has served as co-owner and VP of Marketing and Sales at Southern Life Insurance Company, where she supports clients with life insurance, Medicare options, and retirement planning. She also recruits and trains agents, oversees office productivity, and leads with a teaching-focused approach that prioritizes connection over sales.

Crystal graduated Magna Cum Laude in Business from Auburn University, majoring in Marketing and Logistics. Her background in Wal-Mart Logistics and partnership with an experienced agency builder equip her with the skills to run a successful agency. Her 11 years in education and coaching, along with Master's and Specialist Degrees from Columbus State University, fuel her natural talent for training. In 2012, she was honored as Teacher of the Year at Franklin Forest Elementary.

Crystal works alongside her husband, Nicholas Poe, a Senior Market expert since 2005. They have two children, Cameron and Anna, both standout students and athletes. Inspired by her parents' example, Crystal brings a strong work ethic and a heart for helping others. Outside of work, she enjoys fishing and hunting with Nick, shopping with friends, traveling, and cheering on her kids in sports.

LINDSEY CURRY

HIPE Financial

- lindseycurry@orca.life
- Louisville, KY; *active licensed agent in KY, IN, TN, OH, WV*
- Medicare Advantage, FE, Life

Lindsey Curry is a dynamic leader in insurance and agency development. She has made it her mission to grow and develop leaders. Lindsey serves her agents with a "one-at-a-time" mentality. She believes giving one-on-one attention to understand what people need is the key to making a big impact. Allowing time to connect and develop the relationship is something she is extremely passionate about. She says the one thing that excites her most about this business is how she can change the trajectory of a person's life. The business can completely change the roadmap for their family and future family's life.

DWLC ADVISORY COUNCIL

LORRIE GIBBONS

KAFL Insurance Resources

- lorrie@kafl.com
- Rochester, NY; *active licensed agent nationally, specializing in NY, PA*
- Underwritten Life, Disability, Long-term Care, Annuities, Employee Benefits, & Medicare

Lorrie is the President and CEO of KAFL Insurance Resources in Rochester, New York. As one of the principals, she is focused on strategic leadership and organizational planning initiatives to effectively grow the agency and internal support team. With over 20 years of experience in the industry and her extensive operational expertise in brokerage, she's using her knowledge to support other agencies in growing business value through individual insurance sales strategies and process efficiency consulting work.

Lorrie loves training, coaching, and mentoring new leaders in the business. She serves on the AIMCOR Board of Directors and numerous other carrier and industry affiliated advisory boards. She earned a Bachelor of Science in Business Management and has a Master's in Human Resource Development. Lorrie earned designations for Fellow, Life Management Institute and Associate Customer Service.

Outside of work, she has a passion for animals, she's currently training their family dog in pet therapy so they can volunteer together in the community. She loves spending time outdoors, hiking, gardening, or watching endless sporting and theater events for her three kids.

JENNIFER HAMANN

Senior Services of Illinois

- jennh@ssiinsure.com
- Clearwater, FL; *active licensed agent in FL, CO, TX, NM, IL, OK*
- Medicare Advantage, Medicare Supplements, DSNP

Jenn started in the Insurance industry in 2007 and immediately proved that hard work can overcome inexperience. Within her first year, she became one of the top producers in the country. After co-founding her own agency and becoming one of the top General Agencies in the country, she decided to join Senior Services of Illinois in 2012 focusing on growing a top-notch Medicare sales team. She still enjoys selling but spends her time running the day-today operations of SSI, including managing, planning, coaching, and training agents to increase their production and surpass their goals.

Jenn believes in always doing what's right for the client and trains her team to do the same. Her philosophy is simple, put the client's needs first! Jenn grew up in southern California and spent eight years working in Washington DC in politics, before moving to Colorado to start and raise her family. After 21 years in Colorado, Jenn and her husband moved to the Clearwater, Florida area. She has been married to her husband Doug since 2001 and has two sons. When she is not working, she is involved in several charities, enjoys traveling, mostly to different beaches, and striving for happiness, not just as a goal but a lifestyle.

DWLC ADVISORY COUNCIL

ANA HERNANDEZ

Groupo Latinoamericano de Seguros

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Clearwater, FL

Medicare

With over 30 years of experience in the financial industry, Ana Hernandez joined AmeriLife in 2016. She is the Managing Director of Grupo U.S. and Grupo P.R. Ana is bilingual with a deep understanding of multicultural differences. Ana opened the brick-and-mortar agency operation for AmeriLife in Puerto Rico. While there, she also built and developed relationships with U.S. and local carriers, agencies, and agents on the island, growing from four carriers to over a dozen in three years.

In 2019, she relocated to the U.S. and spent a year helping develop the multicultural market for the AmeriLife Career channel. In 2020, she took over management of the consolidated U.S. and Puerto Rico operations.

Ana was born in Colombia and arrived in the U.S. at age 17. She spent 20 years working in Wall Street and Foreign Exchange before relocating to Florida in 1999 to work with one of the largest broker-dealers in the industry.

MOIRA LOWE

Saybrus Partners

mlowe@saybruspartners.com

Hartford, CT

Moira is Principal and Chief Administrative Officer of Saybrus Partners, Inc. and is responsible for the legal, compliance, marketing, human resources, metrics/reporting, and finance functions of the organization. She also oversees the company's acquisition activity.

With over 25 years of financial services experience, Moira is known for her unique in-the-trenches perspective and deep respect for the advisor-client relationship. One of the founders of Saybrus Partners in 2009, Moira was named Principal, overseeing all legal and compliance matters. In 2010, she was appointed President & CEO of the company's new wholly owned broker/dealer and assumed responsibility for human resources. Moira assumed responsibility for the company's financial and budgeting functions in 2011. In 2013, business reporting and marketing began reporting to her and she was named Chief Administrative Officer in 2015.

Moira has also led one of Saybrus' life insurance distribution channels. Prior to joining Saybrus Partners, she held roles such as Vice President, Chief Compliance Officer and Senior Counsel at well-known financial services organizations including The Phoenix Companies, Inc., Tower Square Securities and Sun Life Financial. Moira graduated with a B.S. from Syracuse University and a J.D. from Western New England College School of Law. She and her husband Scott have two grown children, T.J. and Megan.

DWLC ADVISORY COUNCIL

ANGELEA MCLEOD

AmeriLife of Southwest Florida

amcleod@amerilife.com

Bradenton, Sarasota, Venica, Port Charlotte, & Fort Myers, FL

Medicare Advantage, Medicare Supp, Life, and Annuities

A dynamic leader with a heart for people and performance, Angelea McLeod has dedicated 19 years to AmeriLife and currently serves as Market Leader for the Southwest Florida Career Division, overseeing high-performing offices in Bradenton, Sarasota, Venice, Port Charlotte, and Fort Myers.

Her journey with AmeriLife began in Indian River County, where she spent 18 years as Managing Director, leading successful teams in Port Saint Lucie and Vero Beach. A proud member of the AmeriLife Hall of Fame, Angelea blends a strategic vision with a deep passion for mentoring and development.

Before her career in insurance, Angelea spent 17 impactful years in education as a teacher and elementary school principal. She holds a bachelor's degree in education from the University of Florida and a master's in leadership from Florida Atlantic University. She's also a certified behavior analyst, bringing a unique perspective to team growth and performance.

When she's not leading teams, you'll find her behind a camera, cheering on her favorite MLB or college football teams—or doting on her beloved Yorkies: Bella, BayLee, and Boca.

TIFFANY PORTER

Senior Market Advisors

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Nashville, TN

Medicare Advantage

Tiffany Porter is the Executive Vice President of Business Development at Senior Market Advisors, bringing over a decade of experience in the Medicare industry. She began her career on the carrier side at Cigna, where she led initiatives across multiple operational channels, building systems to enhance productivity and inventory management. Her drive to expand into sales led her into account management, where she launched national retail and provider growth programs to scale distribution efforts.

Tiffany later played a pivotal role in a startup value-based care organization, standing up its Medicare sales and growth channel from the ground up. She eventually transitioned to the broker distribution side, beginning with Buffalo Health Advisors and ultimately stepping into executive leadership at Senior Market Advisors. Known for her entrepreneurial mindset and collaborative leadership style, Tiffany has a unique ability to take strategic vision and translate it into actionable growth. She is passionate about identifying new opportunities, building scalable solutions, and fostering a "rising tide lifts all ships" culture.

She holds a Bachelor's Degree in Biology and Business Management and a Master's in Business and Marketing Analytics from the University of Alabama, roll tide! Outside of work, she enjoys hiking, traveling, painting, and spending time with friends and family, especially her six-month-old daughter, Teagan.

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BOARD OF ADVISORS

RAYNA REYES

American Federal

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Jacksonville, FL

Annuities, Life, Medicare

Rayna G. Reyes has helped thousands of employees since 2005. At the age of 14, Rayna began working with her father in his financial services business, which set the stage for her career. Rayna's focus includes preparing for long-term income strategies while maintaining a safe, growing financial nest egg. Rayna and her husband, Richard, work together in Jacksonville, Florida, managing and training a national team that conducts workshops and assists employees with retirement and benefit planning. They have three children, the eldest of whom graduated from the University of North Florida with a degree in Business and works with his parents in their home office.

Rayna graduated with a Bachelor of Arts from the University of West Florida. As a Registered Financial Consultant (RFC), Final Expense Planning Specialist (FEPS) and a National Social Security Advisor Certificate holder, Rayna has excelled in showing her clients how to both plan for the present and conserve their future family legacy.

ANGI REEVES

AmeriLife

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Canton, GA

With nearly 30 years of experience in marketing and communications, Angi Reeves serves as Vice President, leading a creative services team within AmeriLife's marketing department. She oversees a talented group of thirteen professionals supporting marketing strategies and initiatives for the Accumulation & Retirement Income (ARI) division affiliates within the wealth distribution space.

Angi's background includes expertise in branding, recruiting, marketing, multimedia production, corporate communications, social media, and content development. With a strong mix of industry knowledge and creative leadership, she plays a key role in shaping and executing creative strategies that elevate brand presence, enhance recruiting efforts, and support overall business growth for AmeriLife and the ARI Affiliates.

Licensed in life and health insurance in Georgia, Angi also holds a bachelor's degree in English with a minor in Business.

Outside of work, Angi lives in Canton, Georgia, with her husband, Brian, their two children, Chance and Dia, and their dog, Bella. She enjoys traveling, spending time with her family, camping, and relaxing at the beach.

DWLC ADVISORY COUNCIL

LIES RUSTICUS

Brookstone Capital Management

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Grand Rapids, MI

Lies is the Operations Project Manager at Brookstone Capital Management. Prior to joining the PMO team, Lies spent 12 years within the financial services industry supporting financial advisors and leading a team of Advisor Services specialists.

Lies graduated with a Bachelor of Science from Grand Valley State University in 2008. She is Series 65 licensed and life and health insurance licensed. Lies and her husband Adam reside in Grand Rapids, MI and have been married for 12 years. They have three daughters – Avery, Tessa, and Skylar.

DANIELLE WILLIAMSON

Succession Capital Alliance

dwilliamson@successioncapital.com

Newport Beach, CA

Danielle Williamson serves as Chief Operating Officer for Succession Capital Alliance, where she is responsible for day-to-day operations, strategic development, technology, marketing, and driving efficiencies across the firm. Danielle leads the growth & development of the organization alongside Julian Movsesian and Michael Rothman.

Prior to joining SCA, Danielle served as Senior Vice President of Operations for Amwins Group, the largest global specialty insurance distributor. She joined Amwins in 2016 as part of their acquisition of Networked Insurance Agents and was responsible for the integration of NIA into their Access Division. As a member of Amwins' Leadership Team, she joined Succession Capital with broad experience across the insurance distribution segment in all aspects of operations, data analytics, digital distribution, and business strategy.

Danielle received a Bachelor of Science in Finance from Azusa Pacific University and went on to become a Certified Master Six Sigma Black Belt from Villanova University.

She lives in Dana Point, CA with her husband and two sons. She is passionate about giving back to her local community and is a Board Member for the Boys & Girls Club of the South Coast Area. She spends her time at BGC focused on elevating financial literacy & resources for the children who walk through their doors. On a personal note, she enjoys exploring the world with her family, golf, hiking & great music.

DWLC ADVISORY COUNCIL

JULIE WRIGHT

AmeriLife of Texas - Rockwall

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Heath, TX

MedSupp, Medicare Advantage, Ancillary, Life, Annuities

Prior to joining the AmeriLife team, Julie worked in law enforcement as a deputy, patrol officer, and department fiscal administrator for 21 years with Montgomery County Sheriff's Office, San Antonio, and Fort Worth Police Departments. She holds a Bachelor of Science degree in Organizational Management.

Julie has been with AmeriLife of Texas since January 2021. She was promoted to Branch Leader in January 2022 working out of the McKinney office until she opened her office in Rockwall in early 2023. In her time off, Julie enjoys barrel racing with her horses, spending time with her two dogs, and taking in the sights on her motorcycles. The most rewarding part of working at AmeriLife is being able to help people save money on the one thing that could cost the most—healthcare.

MEET OUR EXECUTIVE SPONSORS

KELLY ATKINSON

AmeriLife

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Clearwater, FL

Kelly Atkinson—a 14-year-veteran of AmeriLife—serves as AmeriLife's Senior Vice President, Distribution Operations and Chief of Staff, Wealth Distribution. With a wealth of marketing, communications and operations experience, Kelly works closely with AmeriLife's Executive Leadership Team and key stakeholders across the company to create, implement and roll out plans for strategic initiatives and operational processes designed to support our continued Distribution growth, focused on realizing our vision of a truly holistic financial services platform to serve the marketplace. In addition to her operational focus for our Distribution, Kelly's team leads the charge on all Distribution events, incentive, and sponsorship programs for the enterprise, while also helping to drive forward key initiatives for Health and Wealth Distribution.

Prior to her transition to SVP, Distribution Operations in 2022, Kelly served as Senior Vice President, Brand Management and Creative Services for AmeriLife.

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EXECUTIVE SPONSORS

BOARD OF ADVISORS

KERRI IBARRA
AmeriLife

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Chicago, IL

An experienced executive and leadership coach, Keri Ibarra serves as the Vice President of Talent & Organizational Development at AmeriLife. In her role, Keri partners with senior leaders across the enterprise to drive performance management strategy, succession planning, change management, diversity, equity and inclusion initiatives, employee and leadership development training and coaching efforts; and employee experience initiatives.

Prior to joining AmeriLife, Keri served in a variety of talent management leadership and consulting roles, which allowed her to develop expertise in human capital strategies for the insurance, financial services, and manufacturing sectors. Keri earned a Bachelor of Science in Psychology with a minor in Communication Studies from Northeastern University and Master of Arts in Industrial/Organizational Psychology from the Chicago School of Professional Psychology. Keri is an ACC credentialed coach through the International Coaching Federation.

Outside of work, Keri spends her time with her husband, two kids and their bulldog and is most likely to be found on the sidelines of a soccer game, cheering on her favorite athletes—her kids!

BOARD OF ADVISORS

CHRISTINA RAGONE
AmeriLife

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New Castle, PA

Christina (Chris) joined the AmeriLife family in February 2021 to help build out the Direct-to-Consumer division, Senior HealthCare Direct. As the organization evolved, Chris stepped into a broader leadership role in 2023, supporting the Health Distribution team.

In her current role as Senior Vice President, Distribution Operations and Chief of Staff, Health Distribution, Chris plays a critical role in advancing the strategic vision of AmeriLife's Health Brokerage organization. She partners closely with Executive Leadership, Health Brokerage peers, and affiliate leaders to identify, lead, and execute cross-functional enterprise initiatives that drive operational excellence and business growth. Chris is instrumental in aligning priorities across business units and uncovering synergies across affiliates to ensure consistent delivery of value and scalability.

Her work spans multiple enterprise-level workstreams, including strategic planning, organizational communication, and operational transformation. She brings structure, transparency, and agility to complex initiatives, serving as a connective thread across functions to ensure alignment with AmeriLife's broader Health strategy. Chris also fosters a culture of continuous improvement, seeking opportunities to streamline operations, enhance collaboration, and maximize the collective impact of our affiliate network.

Prior to joining AmeriLife, Chris spent two decades in the property and casualty insurance industry, where she held diverse leadership roles across Operations, Product, Data, and Technology. This cross-disciplinary experience has shaped her ability to navigate complex business environments and drive results through collaboration.

An avid Penn State football fan, Chris enjoys traveling and spending time with her children and grandchildren.