DISTRIBUTION

WLC

WOMEN'S LEADERSHIP COUNCIL

AMERILIFE®

WHO WE ARE

The Distribution Women's Leadership Council (DWLC) is dedicated to the recruitment, retention, empowerment and advancement of women by creating and maintaining a forum of best practices, mentorship and sponsorship to leverage market opportunity and achieve AmeriLife's Distribution business objectives.

The council was created to recognize women in insurance and financial services. In creating and maintaining a forum that delivers best practices, sponsorship and mentorship to empower talent and drive Distribution success, the council will work to cultivate the next generation of women Distribution leaders at AmeriLife. This endeavor will create more equitable opportunities for women to develop personal and professional skills while learning to foster diversity, inclusion and advancement for women.

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. 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 do the right thing, even when no one else is around. 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 LEADERS

Kelly Atkinson - AmeriLife

Email: katkinson@AmeriLife.com
Location: Clearwater, FL

Kelly Atkinson — a 13-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.

Kim Barton - MCC Brokerage

Email: kbarton@mccbrokerage.com
Location: Tampa, FL
Specialty: Medicare Advantage

Kim Barton is the Vice President of Operations at MCC Brokerage, where she leads with a dynamic blend of expertise and vision. With over a decade of experience in the financial services industry, Kim's journey at MCC began in 2019 as a Commissions and Accounting specialist, quickly rising to the position of Director of Operations by 2021. She has since been promoted to Vice President of Operations. Kim's multifaceted background includes roles in customer service, social media, and senior management, showcasing her versatility and deep understanding of complex operations. 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. In the office, Kim is a passionate advocate for mentorship and empowerment of women in her workplace. Kim champions team synergy and professional development initiatives, driving MCC Brokerage towards unparalleled success.

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, spending time outdoors, volunteering, traveling, cooking, and entertaining friends.

Amber Bubp – AmeriLife Marketing Group

Email: amallen@agentconnection.net
Location: Clearwater, FL; active licensed agent in FL, MI, SC, TX, VA
Specialty: 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 a precious little boy in August 2022, marking a momentous milestone that brings her boundless happiness and fulfillment.

Lindsey Curry – HIPE Financial

Email: lindseycurry@orca.life
Location: Louisville, KY; active licensed agent in KY, IN, TN, OH, WV
Specialty: 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.

Lorrie Gibbons - KAFL Insurance Resources

Email: lorrie@kafl.com
Location: Rochester, New York; active licensed agent nationally, specializing in NY, PA
Specialty: Underwritten Life, Disability, Long-term Care, Annuities, Employee benefits and 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

Email: jennh@ssiinsure.com
Location: Highlands Ranch, CO; active licensed agent in CO, TX, NM, IL, OK
Specialty: 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-to-day 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 8 years working in Washington DC in politics, before moving to Colorado to start and raise her family. She has been married to her husband Doug since 2001 and has 2 sons. When she is not working, she is involved in several charities, enjoys traveling, mostly to different beaches, and will be moving to Florida in the fall. Her motto is happiness is not a goal, it's a lifestyle.

Ana Hernandez – Grupo Latino

Email: AHernandez@Insurancegls.com
Location: Clearwater, FL
Specialty: 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.

Keri Ibarra – AmeriLife

Email: KIbarra@AmeriLife.com
Location: 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 (7 and 10 year old) and their bulldog and is most likely to be found on the sidelines of a soccer game, cheering on her favorite athletes – her kids!

Moira Lowe – Saybrus Partners

Email: mlowe@saybruspartners.com
Location: 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. 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.

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Angela Palo – Pinnacle Financial Services

Email: APalo@PFSInsurance.com
Location: Warminster, PA
Specialty: Medicare

Angela is Chief Operating Officer and co-owner of Pinnacle Financial Services in Warminster, Pennsylvania. As one of the principals, Angela oversees all daily operations of the company. Her responsibilities also include traveling to meet with agents, carriers and vendors nationwide. Angela is a member of several nationally recognized insurance carrier advisory boards and has been a speaker at numerous industry events, including the National Medicare Supplement Conference. Angela is on the NAHU Medicare Advisory Council and NAHU Medicare FMO Council. She is also involved in several community and philanthropic events and uses Pinnacle as a platform to volunteer and donate to charities throughout the year. She holds the following designations: Fellow, Life Management Institute Associate, Customer Services, LOMA Long-Term Care Professional, HIAA Health Insurance Associate, HIAA Managed Healthcare Professional, and HIAA.

Crystal Poe – Southern Life Insurance

Email: cpoe@southernlifeins.com
Location: LaGrange, GA; active licensed agent in GA, AL, SC, TN, VA, MI
Specialty: Annuities, Final Expense, Medicare

Since May 2013, Crystal Poe is the co-owner and Vice President of Marketing and Sales at Southern Life Insurance Company. She helps her clients with life insurance, Medicare options, and retirement planning. Crystal is also responsible for recruiting and training agents who partner with Southern Life Insurance Group as well as overseeing the productivity of the office staff. Crystal believes in a helping and teaching approach with her clients instead of a sales approach. She understands how to connect and communicate with her clients.

Crystal graduated Magna Cum Lade in Business from Auburn University majoring in Marketing and Logistics. Her degree and experience with Wal-Mart Logistics, and partnering with an experienced agency builder, gives her the business skills she needs to run a successful agency. Her helping approach and natural training skills come from her 11 years in education and coaching, accompanied with her Masters and Specialist Degrees in Education from Columbus State University. One of Crystal's favorite accomplishments was being honored with The Teacher of the Year award while teaching mathematics at Franklin Forest Elementary in 2012.

Crystal enjoys working side by side with her husband, Nicholas Poe, who has been in the Senior Market space since 2005. Crystal has a son, Cameron Poe, and a daughter, Anna Poe. Both children are exceptional students and athletes. When Crystal is not working, she enjoys fishing and hunting with Nick, shopping with friends, traveling, and watching her kids play sports.

Ana Quintero – AmeriLife Career Agencies

Email: Ana.Quintero@AmeriLifeAgent.com
Location: Miami, FL
Specialty: Life, Annuities, Medicare

Ana is Managing Director of the AmeriLife of South Florida location. Before joining the AmeriLife team, Ana was an Independent Sales Representative for New York Life, Hartford Life and Midland National Life. In 1994, Ana earned a degree in Business Administration from Florida International University. Ana and her husband, Eric, currently live in Miami and have two beautiful daughters, Erica and Nicole.

Christina Ragone – AmeriLife

Email: cragone@AmeriLife.com
Location: New Castle, PA

Christina (Chris) joined the AmeirLife family in February of 2021 to help support the build out of the Direct-to-Consumer division, Senior HealthCare Direct. As the organization evolved, Chris had the opportunity to take on a larger role in 2023, supporting our Health Distribution team. As Senior Vice President, Distribution Operations and Chief of Staff, Health Distribution, Chris supports the vision of our Health Brokerage organization through partnership with our Executive leadership, Health Brokerage peers and affiliate partner community by identifying, coordinating and executing on key projects and initiatives that support the company's growth objectives. As the AmeriLife family continues to experience rapid growth, her focus has been on bringing structure, transparency and communication to the team, while also looking to identify synergies across our affiliates to help drive efficiency and foster a continuous improvement mindset.

Prior to joining AmeriLife, Chris spent 20 years within the property and casualty insurance industry where she held various strategic roles within the Operations, Product, Data and Technology verticals. An avid Penn State football fan, she enjoys traveling and spending time with her children and grandchildren.

Angileen Reeves – TruChoice Financial Group

Email: areeves@truchoicefinancial.com
Location: Woodstock, GA

As the Vice President of Marketing for TruChoice, one of the largest distributors of insurance products in the financial services industry, Angi brings more than 18 years of industry experience, and more than 28 years of marketing experience to their TruCreative marketing team. She leads a team of nine that supports corporate marketing initiatives at TruChoice, with a heavy focus on branding, communications, multimedia, and training event support. Angi is also passionate about growing their exclusive TruWomen peer-to-peer platform, formed in 2021 to help women in the financial services industry "Engage, Empower, and Elevate" their practices. She is life and health insurance-licensed in the state of Georgia and holds a bachelor's degree in English with a minor in business. Angi and her husband Brian have been married for more than 21 years, have two children, Chance and Dia, and a dog named Bella. She loves spending time with her family, watching her kids play sports, camping and spending time outdoors.

Rayna Reyes – American Federal

Email: Rayna@AmericanFederal.org
Location: Jacksonville, FL
Specialty: 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.

Lies Rusticus – Brookstone Capital Management

Email: lies.rusticus@brookstonecm.com
Location: 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.

Candice Wood - AmeriLife Career Agencies

Email: CWood@AmeriLife.com
Location: Greensboro, Cary, Wilmington and Roanoke, VA
Specialty: Medicare Advantage, Medicare Supp, Life, Annuities

Candice is a market leader over the Greensboro, Cary, Wilmington and Roanoke, Virginia, locations, and has been a General Manager with AmeriLife since 2008. She began working with AmeriLife in 2001. Before she arrived at AmeriLife, she obtained a Bachelor of Science from the University of Greensboro. Candice lives in Greensboro, North Carolina, is a member of the United Church of Christ in her hometown of Sanford, North Carolina, and currently attends Shady Grove Wesleyan Church in Colfax. Candice enjoys spending time with her family, as well as kickboxing, exercising and giving back to her community.

Contact DWLC@AmeriLife.com