

# 2020 List of Past Participants

## January - Sherri Schug



Sherri Schug, a Case Manager on our Trad Team, has been named the Employee of the Month!

Sherri joined our Traditional Case Management team in February of 2015. She came to DBS with many years of Case Management experience under her belt. Sherri transitioned quickly into her role at DBS. Her positive attitude immediately rubbed off on her colleagues and customers.

Sherri truly embodies the customer service spirit and approaches each case as if it's the most important case that she's ever worked on.

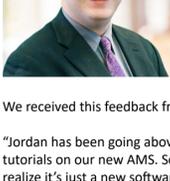
Sherri's proactive approach means that she is always putting the customer's experience first!

This month we received this great feedback on Sherri's work from a colleague. They had this to say about Sherri:

"It is so helpful when case managers get the underwriting department involved in financial cases before they go awry. Sherri is always great about this and never makes an exception. Most of the time, it's too late to assist with financial cases when the information from the broker is sent to the carrier, without a review by the DBS underwriters. With just a few tweaks or additional information, the carrier underwriting can be made aware of the case details and can approve the case financially. Otherwise, they would have to backtrack and clean up confusing or incorrect information. Thank you, Sherri! You make our job easier."

When she is not at family activities, she enjoys her bowling league, and volunteering with her church/community. She is also quite the 80's karaoke star!

## February - Jordan Diel



Jordan Diel, a Case Manager on our FASTerm Team, has been named the Employee of the Month.

Jordan joined DBS in August of 2019 as a member of Support and Services. He quickly learned his initial role and picked up on the functions of the company so he was given an opportunity to move into case management. He started on the FASTerm team in December.

Jordan had already shown a particular aptitude for technology, so he was named as one of our SMEs for the AMS Conversion. This made him a more visible member of the team because of his involvement in learning the new system, being involved with training sessions, and working with team members to learn and understand the ins and outs of Agency Integrator.

We received this feedback from another member of the CM team:

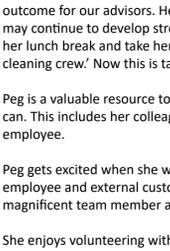
"Jordan has been going above and beyond by sitting one-on-one with select case managers who have opted in to getting overview tutorials on our new AMS. Some people have been a little concerned about the transition, but by sitting with Jordan, they've come to realize it's just a new software tool that needs to be learned and used. In addition, he has helped during small group training sessions and offered his ideas as we're still ironing out various details. This has all been time consuming but very much appreciated. His assistance has really taken a lot of pressure off me being the only one left in New Business on this project from a year ago, especially during this busy transition time. Thank you, Jordan!"

Jordan is always willing to step in and solve problems for anyone that needs help. He has an incredibly friendly and positive approach to all his work.

Jordan is a huge Star Wars fan and loves to chat about movies, music, and all things digital. His positive energy is a great addition to DBS!

Jordan was chosen from 12 internal nominations and 5 advisor nominations.

## March - Peg MacArthur



Peg has been with DBS for almost 24 years. She had a slight break from DBS and came back. Her first position was as an executive assistant to our founder, George Van Dusen III. Peg is one of the few employees that had the pleasure of knowing Tori and Chip when they were running around the DBS office as teenagers.

Peg is an employee who deeply cares about DBS and her co-workers. She is the part-time gardener and protects the plants with bug repellent. She makes sure that the M&M jar is always filled and she is constantly bringing in treats for her fellow co-workers. Peg cares about everyone she comes in contact with. A DBS employee had this to say about Peg:

"Peg is constantly in service-mode while she is working. She is always trying to find the best possible outcome for our advisors. Her commitment to DBS is also very strong. Peg helps to create an extremely positive culture so that DBS may continue to develop strong, internal engagement. She takes the commitment to DBS so seriously – I watched her come in from her lunch break and take her shoes off inside. She did this so she 'wouldn't' leave any messy shoe prints on the front steps for the cleaning crew.' Now this is taking care and commitment to a new level."

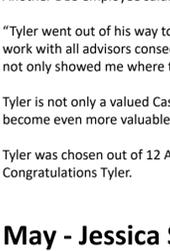
Peg is a valuable resource to the underwriting department and she is always the first person to offer assistance in any way she can. This includes her colleagues or advisors. She is constantly learning and challenging herself to improve as an underwriter and employee.

Peg gets excited when she wins a case or when she can help an agent or an insured. She takes a personalized approach to every employee and external customer. Her commitment to DBS is very strong and is very appreciated around the office. She is a magnificent team member and DBS is very lucky to have her in our underwriting department.

She enjoys volunteering with her church. During the COVID-19 pandemic, Peg has been shopping for her neighbors and helping anyone in need.

Peg was nominated by six co-workers and two agents.

## April - Tyler Jarosz



Tyler picked up the CDA role very quickly. When the CDA team regionalized in March of 2019, Tyler took over as the lone CDA in the Western Region for the Ameriprise Unit. Having such a large region with many high-level advisors can bring challenges. Tyler has risen to the occasion and has established many strong relationships with his advisors. Just last week, with 58 cases coded to the CDA team, 15 of them were from Tyler's region!

Tyler takes great pride in his work and is always striving for more. He picked up the new CRM very quickly and was a natural at navigating his way around it. Tyler took it to the next level and taught himself how to do Advanced Searches. This is what one of his team members said about Tyler:

"Tyler has been proactively assisting the team in improving our CRM experience. He has been diligently exploring the system and finding ways we can implement more efficient methods to use the new CRM. Tyler has embraced the use of the new system. He has gone above and beyond by becoming a go-to resource for the CDA Team, as well as other departments. He has mastered the advanced search feature which will be very useful for the team."

Another DBS employee said:

"Tyler went out of his way to help me with a CRM problem with finding advisors. I don't have the luxury of having set advisors, but I work with all advisors consequently. I don't know "middle names" and often need to search by phone number and nickname. Tyler not only showed me where the advanced searches were, but also set up several special searches based on my specific needs."

Tyler is not only a valued Case Design Analyst for the Ameriprise Unit, but he continually seeks out ways he can improve and become even more valuable to DBS. Recently, Tyler started pursuing his CLU designation.

Tyler was chosen out of 12 Advisor Nominations and 13 Co-Worker Nominations. This is his second Employee of the Month win! Congratulations Tyler.

## May - Jessica Schultz



Jessica started working with DBS in October 2016 as a Licensing Specialist. Since then, she has grown in her role to master commissions and has become the Licensing & Commissions team lead. Jessica does a great job balancing her Licensing & Commissions tasks and solving problems every day.

Jessica has been instrumental in getting the licensing team up and running in AI. She is now working to set everything up for our commissions launch (which has been a lot of work!). This move will allow us to grow in our commissions auditing and efficiencies. Jessica manages all these additional tasks and projects with a smile on her face and a calm attitude.

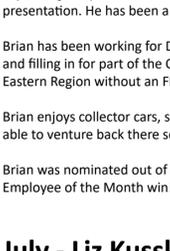
Here are just a couple of Jessica's most recent nominations:

"Jessica constantly goes above and beyond to provide service and support to our customers and our DBS team. Whether it's a simple question or answers to an extremely complex situation, Jessica wastes no time in responding with solutions that continue to prove that DBS excels at serving our customers. Jessica is unbelievably dependable and responsive. She has an amazing sense of urgency and delivers outstanding service with professionalism."

"Jessica's dependability is evident whenever she receives a question about commissions from an agent or representative. You never have to worry about delayed information, as it's out in a timely fashion. This is very important when it's the first few paid cases and the reps are wondering when they will get paid."

Jessica and her husband have been enjoying settling into their first home with their new puppy. They love checking out new hiking trails and watching the Twins whenever they're playing.

## June - Brian Fair



Brian is a consistent contender for the Employee of the Month honors; earning nominations month after month. June was no exception. Brian had two Advisor Nominations and three Co-worker Nominations. This resulted in another WIN for Brian!

This is Brian's fourth Employee of the Month win! Previous wins include: June of 2014, January of 2017, and May of 2019.

An advisor had this to say about Brian:

"He said he was introduced to DBS at the Advisor Group conference in Nashville last Fall and decided to give us a try by requesting illustrations to get used to how we work. Though not all of the opportunities have come to fruition, he is so impressed with Brian's knowledge, level of detail, quick follow-up and willingness to be a true partner to his business."

A coworker of Brian's commented:

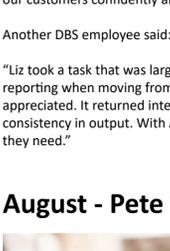
"Brian has been working with me on a very large case that keeps getting set back for one reason or another but has been integral in getting it back on track each time. He has been on the phone with the Advisor and the client and does such a great job of explaining the products. He is so knowledgeable, but even more importantly, so passionate about what he does and it shows with his presentation. He has been a huge asset to the team and a great partner. I truly love working with him."

Brian has been working for DBS since November of 2007. He is currently working on the Enterprise Unit for the Eastern Region and filling in for part of the Central Region. Not only is he supporting three FRMs, but he is also successfully maintaining the North Eastern Region without an FRM.

Brian enjoys collector cars, shooting rifles, smoking a nice cigar, and traveling to his favorite spot in Jamaica. Hopefully, Brian will be able to venture back there sometime soon.

Brian was nominated out of four Advisor Nominations and 12 Co-Worker Nominations. Congratulations Brian on your fourth Employee of the Month win! Thank you for all you do.

## July - Liz Kusske



Liz joined DBS in August 2011 and just celebrated her nine-year anniversary last weekend! This isn't Liz's first Employee of the Month win. In fact, it seems like Liz peaks every three years because she has won in 2014, 2017, and 2020.

Liz came to DBS after being highly recommended by numerous industry associates. In fact, before joining DBS, Liz worked with several advisors affiliated with DBS. She came to the company already acquainted with a few of the DBS employees. Her previous industry experience included working for a John Hancock GA as their New Business Manager and as a Regional Sales Administrator for Penn Mutual.

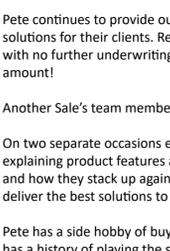
Liz is an integral part of the DBS team. She is responsible for making everything run smoothly in addition to managing Chip and Tori's responsibilities. She is in constant contact with our carrier partners, arranging lunch and learns, scheduling the many meetings and events with our sales team, and handling various special requests that may come up. Liz's hard work does not go unnoticed. A co-worker had this to say about Liz:

"Liz has spent an inordinate amount of time and energy working with our new CRM/AI system since its launch to improve the accuracy and effectiveness of our reporting capabilities. Providing our customers with accurate, credible, and timely information is absolutely critical. Unfortunately, we were finding that a large number of cases and premiums were being coded inconsistently, causing our reports to our National Account customers to be somewhat inaccurate. Liz, along with others, spent a tremendous amount of time going through each case in the system, making sure the premiums were accurately coded so that we can report to our customers confidently and accurately."

Another DBS employee said:

"Liz took a task that was larger than ever imagined. You don't know what you don't know until you know it. That's true of premium reporting when moving from one system to another. The reclamation project she jumped into and saw to the end was greatly appreciated. It returned integrity to our AMPF reporting. It also solidified premium entry procedures to support training and consistency in output. With Andrea's departure, it's great to have a SME and a real partner getting our institutions the information they need."

## August - Pete Schulte



Pete Schulte has been with DBS since August of 2009. He just celebrated his 11-year anniversary at DBS. Pete came to DBS from Allianz, where he worked on the sales desk. He was initially hired to work on the IMO team, where his knowledge of Index UL and Allianz products were extremely valuable.

Pete grew up in the life insurance industry. His father owned a Mass Mutual general agency where Pete started working as a policyowner. Pete had many roles there from Case Design to New Business, Underwriting, and even Policyowner Service.

Pete's optimistic, "can-do" attitude makes him a true pleasure to work with. He is an asset to the Case Design and Sales Team alike. When the CDA team regionalized in 2019, it was a natural transition for Pete to move to the Enterprise unit, where his strong phone skills were a necessity. A co-worker on the Sale's team had this to say about Pete:

Pete continues to provide outstanding service to our advisor customers. He goes above and beyond to guide them to provide solutions for their clients. Recently, Pete worked with a newer IFG advisor with Lynn Williams to actually increase the death benefit with no further underwriting. The advisor will place the higher face amount because the client was thrilled to get a higher face amount!

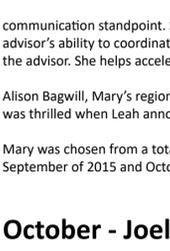
Another Sale's team member said:

On two separate occasions earlier this month, unsolicited, advisors stated how much they appreciated Pete's thoroughness in explaining product features and benefits, as well as his follow up. Pete has great awareness of where a given carrier's strengths are and how they stack up against the competition. He consistently upsells whenever possible. This is a perfect example of his efforts to deliver the best solutions to the advisor and their clients.

Pete has a side hobby of buying and selling hard-to-find Lego sets, which really seems to have taken off since the pandemic. Pete also has a history of playing the saxophone and even went to an European tour right after high school. He says that it was the best trip he has taken—even playing in the Montreux Jazz Festival. He is hoping to refresh his music skills in the future by taking up the piano again. When the pandemic is over, you will probably find Pete at his favorite steakhouse, Manny's!

This is Pete's first Employee of the Month Win. He was chosen out of seven co-worker nominations and five agent nominations. Congratulations Pete!

## September - Mary Moore



Mary joined DBS in January of 2009 and has been a valuable member of the DBS Team. As part of her role as a Case Manager in the Eastern Region, Mary has accountability for several states. This includes the always exciting state of New York! Mary has a deep knowledge of the many unique regulations and rules surrounding New York business. She is a resource for the rest of the team on questions related to New York. She is known for her consistently professional approach and the ability to never let an advisor rattle her calm nature. Mary starts each day ready to help anyone in need.

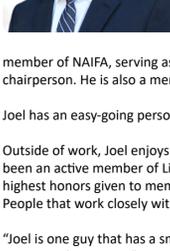
A co-worker had this to say about Mary:

"Mary consistently provides outstanding service and support to our customers, particularly from a communication standpoint. She is very straight to the point and specific. This helps to avoid misunderstandings and improves the advisor's ability to coordinate with their clients. Mary's knowledge and experience working with the carriers provides confidence to the advisor. She helps accelerate approval and delivery of the policy."

Alison Bagwill, Mary's regional supervisor said, "Mary has the right mentality and attitude for the East Coast advisors she supports. I was thrilled when Leah announced to me that Mary would be a part of my region!"

Mary was chosen from a total of 13 employee nominations. This is her 3rd EOM win, having previously taken home the distinction in September of 2015 and October 2017! We are truly blessed to have her be a part of our TEAM! Congratulations, Mary!

## October - Joel Johnson



Joel Johnson has been a Field Relationship Manager for DBS since 2005 and has been a strong and positive force for many years here at DBS. Currently, Joel is responsible for covering the North Central region which includes: Minnesota, Iowa, North Dakota, South Dakota, and Montana.

Joel entered the insurance industry in 1981 serving clients in the Financial and Estate Planning services in west central Minnesota. He also served as a business development director for several banks and accounting firms in their wealth management programs and served as a regional Life Insurance Specialist serving community banks in the central region for PrimeVest Financial.

Joel achieved his CLU and ChFC designation from the American College in 1998, and he holds FINRA series 6, 63, 7 and 66 licenses. Joel achieved NAIFA's LUTCF designation in 1985, and is an active member of NAIFA, serving as past President of two local chapters and serving as the state NAIFA-MN Professional Development chairperson. He is also a member of the Society of FSP and FPA of MN.

Joel has an easy-going personality and a giving heart, which helps him to have a great connection with his advisors.

Outside of work, Joel enjoys listening to the Beatles, being with family, enjoying the outdoors (perhaps fishing or hunting), and has been an active member of Lions Club for many years. In fact, Joel was the recipient of the Melvin Jones Award, which is one of the highest honors given to members of the Lions Club.

People that work closely with Joel had this to say:

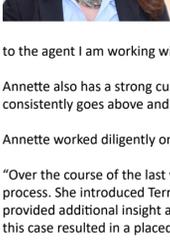
"Joel is one guy that has a smile on his face and works hard every day to make a difference. He is a true professional and a great member of the team!"

"Joel exemplifies the definition of integrity and commitment to service that DBS strives for."

"I had a conversation with one of Joel's advisors who let me know what a valuable addition to his business Joel is. The advisor is working to develop a potentially significant relationship with a business broker. After having a conversation with Joel, he was able to incorporate several topics that resonated with the potential customer. He felt strongly that those value-added insights from Joel will help cement the deal."

"Joel takes a tremendous amount of pride in his ability to develop business, and constantly makes an effort to position DBS as the premiere source for life insurance in the business."

## November - Annette Miller



Annette Miller has been with DBS for over 10 years. In fact, she just celebrated her 10-year anniversary in September! Prior to joining DBS, she worked for carriers such as Voya and Pacific Life. This brings her total tenure in the life insurance industry to 20 years. During this time, Annette has accumulated a wealth of knowledge and experience. She continues to be an incredible asset to the Case Design Team and DBS.

Even though we are in a remote environment, most team members know Annette or have gotten to know her. She is always willing to step up and help others when needed. One of her co-workers recognized her and writes:

"Annette is always willing to help. She explains the product or illustration so that I can then explain it to the agent I am working with. She is always thorough and will look into an issue if there is one and gets back to me right away."

Annette also has a strong customer focus. Everyone that works with her knows that she always provides top-level service. She consistently goes above and beyond for her advisors and will stop at nothing to see a case come to fruition.

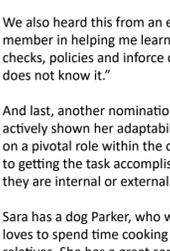
Annette worked diligently on a large case which went paid recently, largely due to her efforts. The nomination explains:

"Over the course of the last year, Annette was able to not only provide the case design, but went above and beyond in the education process. She introduced Terri and others as needed to assure we did everything possible to move the case along. As it developed, she provided additional insight and continued to steer the case in the right direction. The sensitivities and follow-up Annette built into this case resulted in a placed case! Thanks, Annette, for the investment and concern."

Despite the size of the case or any task given to her, Annette puts every effort forth in anything she does, while always providing top-quality work.

The competition was tight in November as there were 23 total nominations. This is Annette's 4th Employee of the Month win. She won in 2014 and TWICE in 2016. She also had the honor of winning Employee of the Year in 2016. Congratulations to Annette! Well deserved.

## December - Sara Lloyd



Sara joined DBS in March of 2018. As the Case Coordinator Lead she wears many hats as part of her role. She has a ton of knowledge and is never afraid to dig in with others. Sara has been extremely open to learning about all areas of New Business. This exposure helps her produce creative solutions to problems we encounter and to see the big picture when she is evaluating our workflows. Sara received numerous nominations this month, all of them illustrating the great things she is doing here at DBS.

As one nomination explains, "Sara has a lot on her plate but continuously handles anything new thrown at her with grace and urgency. She has a wealth of knowledge regarding carriers and DBS, and she continues to show high quality work and attentiveness to our case management needs and asks. When I reach out to us for assistance on something, it's always to the point and very easy to understand. Her communication is superb, and I love that I can quickly bounce an idea off of her if I come across something out of the ordinary to make sure the case goes smoothly from the start."

We also heard this from an employee: "The transition to my new position, Sara has been a great teacher as well as team member in helping me learn many new tasks. Year end has been incredibly busy in the office handling the mail machine, overnights, checks, policies and invoice calls, but Sara is always willing to help and share her knowledge as well as help find the answer if she does not know it."

And last, another nomination explains, "Sara has been an incredible gift to the DBS TEAM since her start in our organization. She has actively shown her adaptability to change and willingness to LEAD by example even during incredibly stressful times. She has taken on a pivotal role within the company and is constantly challenging herself to grow and learn each day. Her tenacity is a key attribute to getting the task accomplished even if it is outside of her comfort zone. She digs in deep to help SERVE her customers no matter if they are internal or external. She has great pride in her work and it reflects back on all of us at DBS."

Sara has a dog Parker, who when she works from home, sits in a chair next to Sara and stares lovingly at her throughout the day! Sara loves to spend time cooking with her daughter, trying out new restaurants (when it's not COVID), and getting together often with relatives. She has a great sense of humor, is an AVID reader and loves to bargain hunt!

Sara is super kind and helpful, and goes above and beyond to help both family members and co-workers. She has done a superb job of filling in for Alaina while she is out and has done a great job as Lead for the Case Coordinators. She is very organized, catches on quick, and always volunteers to help invoice and Support and services when she can. This is Sara's 2nd EOM win! We are so happy to have her be a part of our team. Congratulations, Sara!