

# DBS Employee Recognition Program

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## *Employee of the Month - 2015 Recipients*

### **DBS 2015 Employee of the Year**



Marketing Media Specialist Laura Thompson was chosen as the 2015 recipient of the DBS Employee of the Year award. Laura takes pride in everything she does, consistently producing work that is thoughtful, detailed, and of the highest quality. She is interested in finding new ways of doing things and enjoys researching different topics and approaches. A valuable asset to the sales team, Laura provides materials that show off what makes DBS unique as a BGA and how its employees are a step above the rest. Her creativity and design sense is apparent in many of the marketing campaigns, and she thoroughly enjoys being able to tell the "DBS Story."

Laura works with nearly every department at DBS, creating and refining internal documents and processes, crafting advisor education pieces, and producing consumer brochures and flyers for advisors to use with their clients.

### **Brandon Johnsen - December Employee of the Month**

Brandon joined DBS over 9 years ago and will celebrate his 10 year anniversary this September. Brandon came to us from Allianz where he was an Internal Wholesaler and Marketing Consultant. He started on the Marketing Associate team when he joined DBS, but then was moved to our special PBS marketing team for a while. While the PBS team was active Brandon was the Team Leader. At the onset, this team had a very high volume of phone call and illustration traffic which Brandon and his team successfully managed.

After the special PBS Marketing Team dis-banded Brandon came back to being an all account DBS Marketing Associate, much to Jann's delight, and after a short time he was once again promoted to Team Leader and still maintains that role for our current team of 6 MAs. As Team Lead Brandon has become an invaluable leader to the Marketing Associates and also for the entire DBS Staff. He does a great job not only handling his alpha-sort but has taken on some high-profile agents as well who require very special handling. In addition, he has become a respected mentor for all of the MAs.

A recent co-worker nomination said, "Brandon - all day, every day - treats the agents so respectfully with each and every request for illustrations. No matter how busy he is, he takes the utmost care to make sure the products are right for each individual case. I've witnessed him show so much patience, care and consideration with every customer - external AND internal. I really believe ALL of the marketing is deserving, but this time just Brandon. PLEASE."

Though Brandon has experienced some personal hardships this past year, he has not let that interfere with the quality of work he has performed for his team and for DBS. He has consistently performed as a hard-working, helpful and gracious Team Leader, Marketing Associate and Co-worker. Brandon has been consistently nominated every month by agents and co-workers alike and I am glad we can now recognize him and all of his efforts here at DBS.

### **Duncan Anderson - November Employee of the Month**

Duncan Anderson began working for DBS in April, just 8 short months ago, and since that time he has proven time and time again to be a great asset to the Marketing Team and a valued employee for DBS. When Duncan started he knew very little about life insurance and the products DBS markets. However, being the smart guy he is, he has learned an immense amount of information and has proven to be a very quick study. He passed his life insurance licensing test right after he started and just recently passed his accident and health exam as well. He is truly driven and motivated to do everything he can to increase his knowledge and grow in the industry. Not only is he extremely motivated, but he is very gracious and pleasant to work with. He is consistently recognized by our agents and his fellow employees.

A recent agent nomination read, "Duncan was very helpful and professional. I appreciated his help and he was extremely pleasant to deal with. He walked me step by step to help me get the result I was needing. He was great." Also one of his co-workers said, "Duncan has always been so helpful. He tries his best, works hard, and truly cares about helping others, both internal and external. Duncan is motivated and quick as well. Truly a great coworker."

Duncan graduated from Gustavus Adolphus in May of 2014. At Gustavus he played on the tennis team for all 4 years, singles and doubles. Gustavus is the perennial MIAC conference powerhouse for their tennis programs. In the summers Duncan worked as a tennis coach for the Tennis and Life Camp at Gustavus and also independently through a camp in Brainerd. He was a great coach and mentor for the kids there. After college he worked at Sedgewick, where he worked on claims for Target Corporation. He was successful there, but had a desire to work in the life industry which runs in his family. Sedgewick's loss is our gain.

## **Laura Thompson - October Employee of the Month**

The employee of the month for October is known for her creativity and ability to get projects done almost instantaneously. Laura Thompson joined the DBS team in the fall of 2011 on a part-time basis to help with various marketing projects. From the start, Laura was a tremendous contributor to DBS's marketing efforts and it wasn't long before she was asked to join the marketing team on a permanent basis. Laura was chosen for the October employee of the month from 15 employees who were nominated.

Laura is involved with almost every DBS marketing communication including all social media management, email marketing and other marketing campaigns, banner ads and website content, as well as the many other marketing pieces.

Laura is also the go-to person for the numerous projects that crop-up involving the need for graphic design work. Laura consistently receives accolades from co-workers, especially on the sales team for the support she provides personalizing marketing communications for their accounts. One nice comment from an employee was, "Laura has been working very closely with one of my clients go get his website up and running. She has done a fantastic job with all of it. He is absolutely ecstatic. She puts her all into everything she touches and it shows in the quality of her work. Not just in what she has done for my client but also in all of the marketing pieces that she puts together. We are very lucky to have the level of talent that we have in Laura." Another comment from an employee was, "While Laura is always helpful with whatever questions I have, she has been invaluable with her work on the Underwriting Team's questionnaire revamp project. She has had to learn new applications as we have brainstormed ways to make our questionnaires special. Hats off to Laura for hard work and creativity!"

We also received a comment from one of our agents, "Laura went above and beyond the call of duty to create my website for new business development. She was patient, listened to suggestions for design and content, then went to work and like magic, built and designed a wonderful site. She's also training me to use Facebook, Twitter, and LinkedIn. She deserves the DBS Service Distinction."

In addition to all the projects Laura performs for DBS, she also plays piano and violin (plays for weddings) and volunteers at the schools where her three boys, Josh, Ben, and Isaac attend. In her spare time she enjoys gardening, cooking, and spending time with family and friends. Laura and Jason have been married 19 years and live on 10 acres west of Waconia.

## **Mary Moore - September Employee of the Month**

Mary Moore is the very deserving recipient for the September Employee of the Month. She was chosen out of 14 employee and 7 agent nominations. Mary joined DBS in January of 2009 and has risen to the challenge of becoming one of the most senior Case Managers and the "go-to" member of the FASTerm Team. Mary has been instrumental in the training & education process not only for new FASTerm Case Managers, but for our App Team members as well.

Her dedication to DBS is recognized by her peers noting, "Mary has been exceptional over the past weeks with all the changes happening on the FASTerm team. She has become a true leader and a great trainer for the new group. She is the go-to lady and we truly appreciate her!" She does all of this and keeps a very positive attitude. One co-worker noted, "Mary has done a great job keeping up with the changes. I suspect it is very stressful but every time I talk to her, she is in good spirits and willing to help." Another adds, "Mary has been exceptional during this crazy time for the FASTerm team. She not only has been taking the time to train new team members but still gives amazing customer service."

Mary enjoys spending time with her family, especially her niece & nephews. One of her favorite pastimes is going to the movies where she really likes action/adventure and Disney-Pixar moves. One bit of trivia is she went to cosmetology school and is a very skilled nail technician. We are very happy she decided to change up her career path and join DBS!

## **Alaina Winson - August Employee of the Month**

Alaina is our first repeat Employee of the Month and it is very well deserved. She joined DBS in January of 2014 and quickly moved into a leadership position as an App Team lead within the 1<sup>st</sup> 6 months of being with the company. With this role she has helped to organize and grow our talent on the Application Team as well be an excellent resource and role model for

others. She consistently provides feedback on processes in a constructive and positive way. Some of which we are using today and have helped with work efficiencies and providing our customers a greater ease of doing business.

Not only does she consistently get nominations from fellow DBS employees and our customers, she also received some great kudos from Lincoln National for which she is the MoneyGuard Case Manager. "Alaina has done a wonderful job following up on cases, completing applications correctly and connecting with advisors/new business team members. Every new business associate from the Lifemark team has said it's easy to work with Alaina and she pays very close attention to detail!" – Lee Superville. Brian Tueber also with Lincoln National commented, "Alaina is someone that I count on every day when I come into the office because she is on top of everything MoneyGuard related. Anytime I need a case update or have a question for her, she always gets back to me promptly and with amazing information. She is exceptional and I really enjoy working with her on a day to day basis." Alaina was chosen out of 25 agent & employee nominations.

Alaina recently moved to Maple Grove and just celebrated her 2<sup>nd</sup> wedding anniversary with her husband Justin. She is very close with her family and enjoys playing and coaching sand volleyball, gardening, camping, canoeing, fishing or anything outdoorsy. Her simple pleasure is to cuddle up with a good book and just wasting away a morning reading.

## **Peg MacArthur - July Employee of the Month**

Peg has always been a strong contributor to DBS. In 2013, she was the first to be promoted into what is now the DBS Underwriting Team. Peg was chosen for the July employee of the month from 27 nominations. The exemplary customer service that Peg delivers has been noticed, resulting in her receiving several nominations.

Peg backs up the DBS Chief Underwriter when he is out of the office and she does this well. In fact, one of Peg's nominations was from a DBS Relationship Manager who needed Peg's assistance when John was away. Specifically, there were 4 cases that were declined with a combined target premium of \$75,000. Peg jumped into action and turned these declines into offers. This co-worker nomination exemplifies Peg's strong customer focus and drive for results that keep our producers happy and coming back for more.

Another co-worker nominated Peg because of the great service that she provides on a daily basis. This employee noticed the long hours Peg puts in to deliver on her promises. He also appreciates that Peg is always a reliable source of information and willing to drop everything when needed to help a customer. Peg's consistent professionalism under stress was also noted in this nomination as well as her ability to always be a reliable source of information. Peg fully embraces the DBS Underwriting philosophy of never taking shortcuts. This was recognized in July's nominations by another DBS Relationship Manager. This Relationship Manager said that Peg always gives 110% on the cases she handles and understands the customer service side of working with producers. He said she is a loyal A+ employee and an even better person.

Working on special projects is a passion for Peg. She has put enormous energy into the Underwriting Niche Document that is utilized by several DBS departments. This document is integral in helping the DBS team be a step above our competition. Peg is also very excited to begin revamping all of the DBS medical impairment questionnaires. Peg is actively working on both her LOMA and ALU designations. She will soon start preparation for the 2016 ALU examination.

Peg originally started working at DBS in 1985, and after 10 years she left to work for Prudential before returning to DBS in 2005. Peg and her husband, Chuck, live in Robbinsdale. Peg is very excited for her daughter, Alison, to get married in December! Their dog, "Stella from Hella" also keeps them entertained.

## **Brad Tansom - June Employee of the Month**

Brad joined DBS in January of 2010. He came to us with a broad background in Financial Services. He started his career in retail and after developing a successful practice as a financial planner, other opportunities presented themselves in product design, sales support, sales training and then carrier wholesaling. Because of his background, he was assigned the responsibility of managing the relationships with Ameriprise and RBC. In May of 2014, we reorganized the sales team and with his success in managing those two accounts, Woodbury Financial and McGladrey were added to his responsibilities. In the past year, he has had a very full plate and has managed it masterfully.

Brad was chosen from 20 employee nominations and 14 agent nominations. It seems like every month deciding who gets the nod becomes a more difficult task, but Brad stood out in June because he was able to finalize the deal that offers Mass Mutual to Ameriprise Representatives. This was a particularly complex project since it took collaboration between Ameriprise, Mass Mutual Leadership and a Partner BGA. There were lots of opportunities to throw up his hands, but he stayed focused on the primary goal – getting Mass Mutual on the AMPF platform. Along with that, we are now able to offer Mass Mutual to many other producers groups.

Brad and his wife Paula are long time residents of the metro area with three daughters, one who just graduated from college, one in college and one in high school. According to Brad, they keep he and Paula very busy and focused on keeping up on tuition payments. They all enjoy periodic trips to Mexico – which is the reason Brad sports a nice tan all year long.

## **Amy Geary - May Employee of the Month**

Amy joined DBS in the fall of 2008 as a Trad Team Case Manager and has been a strong member of the New Business department for over 6 years. Her previous experience working in an agent's office gives her a great perspective of our customer's needs and wants. She anticipates the needs of her cases to proactively work them, all while providing outstanding service to our brokers.

She is also a good mentor to others within DBS. One of her co-workers who nominated her said, "Amy has always been patient and kind towards all that come in contact with her. She knows how to alleviate a stressful situation and how to make sure to have the best outcome. Amy not only helps, but explains how to find things and takes us, the application team, step by step how to do it for ourselves while using her patience and knowledge. She is very appreciated by all."

Amy lives in Minnetonka with her 10 year old black lab Ruby and her 8 year old kitty, Jerry. She enjoys running, skiing, sporting events, and travel. She is often going to distant destinations to see her favorite band Widespread Panic. Amy was chosen from a total of 17 employee and 12 agent nominations.

## **Pang Xiong - April Employee of the Month**

Pang joined DBS in the summer of 2006 and has been a valuable member of the FASTerm Team for going on 9 years. She is a go-to resource for FASTerm whether it is for our customers or internally. One adviser said it best, "I want to express how happy my team and I are with DBS. Specifically, I am assigned to Pang Xiong, and I have found that Pang is a real WINNER. Every time I ask or e-mail a question of Pang I receive thorough responses. That is how we all should conduct business!!"

Pang consistently has a positive attitude and strives to give the best possible customer service all without glory or recognition. This is why it so fitting to have her be April's Employee of the Month. Her teammates also appreciate & recognize her by noting, "She goes out of her way to help her agents...She spent 20 minutes walking an agent through the online application."

Pang, along with her husband, Kong Lee and son Ayden, resides in St. Paul. She is very active with her family and spends many weekends helping with the myriad of celebration feasts and get-togethers. She also enjoys going to the casino with her friends and family. Pang was chosen from a total of 18 employee and 10 agent nominations.

## **Diana Nosie - March Employee of the Month**

Diana was chosen from 16 agent and 23 co-worker nominations. This was a particularly close process this month with many good candidates and discussion; however, due to her great month of work, Diana is a very deserving recipient of the March Employee of the Month and a great asset to DBS. Some comments from the nominations included her friendliness around the office, her availability to pitch in and help wherever and whenever needed, and an initiative to make sure work gets done on time and correctly. Also in March, she was the primary IT support person while Jason was on vacation and out of the country. Diana started working at DBS on June 5th, 2006 so she is quickly coming up on her 9th year as a valued DBS employee. From the very beginning it was noticed right away that Diana was someone who could be very flexible and was willing to take on more tasks outside of her role in imaging. Quickly, Diana integrated with the New Business department, helping out wherever needed. She has helped out with commission mailings, routinely does the postage, and is now a backup receptionist. As mentioned, she is also a backup to the IT Department and handles a great many day-to-day tasks within the IT Department.

Looking specifically at her achievements within Imaging, Diana has excelled in many areas. Her attention to detail and commitment to the job has led to a continued imaging improvement, and she has stood out a number of times. When DBS switched over to PaperClip, Diana was put in charge of that imaging system and today is the primary contact person for Paperclip, handling most configuration and troubleshooting duties.

Away from the office, Diana is a known movie lover. She also likes spending time with her many friends, knitting, and doing arts and crafts projects. Congratulations to Diana as our March employee of the month!

## **Jesse Sigrist - February Employee of the Month**

Jesse joined our DBS FASTerm Team in 2005. He was a strong leader of this team as a Case Manager for the last 9 years until he was promoted in August of 2014 to a Trad Team Case Manager. Jesse continues to excel in his new role. This has to do with his incredible work ethic and passion to produce the best product possible for his customers. As he notes himself, "I always try to consider what is the best interest of our client rather than try to just get something off my desk." This is recognized by his

customers with continually receiving high marking 4's on customer comment cards. Not only does he get praise from his customers but from his fellow co-workers as well. "Jesse is a great employee and co-worker. No matter what the case may be he gives his full attention, patience, understanding and guidance. He is the definition of an Employee of the Month!"

Jesse lives in New Hope with his wife, Gina and 3 year old daughter Ella, and they will be welcoming their second little girl this summer. He enjoys spending time with his family the most but also enjoys time outdoors, photography and playing guitar. Jesse was chosen out of 15 agent & 11 employee nominations. Congrats Jesse and thank you for your hard work & excellent customer service you provide to all your customers!

## **Debbi Schultze - January Employee of the Month**

Debbi joined DBS in July of 2009 on the then Brokerage Case Management team. Her flexibility and willingness to be a team player is shown in her track record of various moves from Brokerage to an IMO team, back to Brokerage and then being promoted to Trad Team Lead in 2014. This is also consistently recognized by her peers. She is a huge resource to those within DBS and our customers. It is best said by one of her co-workers, "Debbi is a go-to person. She takes the time to listen, teaches and is willing to go the extra step(s) to help you accomplish a task." With even the most stressful of times she has remained a positive leader as commented on by another one of her co-workers, "Debbi has proven to be an excellent Team Leader to the Trad New Business Team. After losing a team member, she kept her calm and as expected, was able to communicate professionally to her team."

Debbi enjoys the lake and beach life and often spends her off time boating on Lake Minnetonka and traveling to Mexico, Florida or any warm beach destination. She will honestly say how much she hates MN winters and there is no love for the snow or cold. Debbi was selected for the January Employee of the month out of 10 agent nominations and 17 employee nominations.