

### APPASSIST CALL CENTER

Conduct telephone interviews with the proposed insured to complete an insurance application and schedule examinations.

General Service	AIS@bannerlife.com	800-839-5960
Dawn Leshinski, Manager	dleshinski@lgamerica.com	ext. 4615
Alex Gretsinger, Supervisor (8:30 a.m. – 5 p.m.)	agretsinger@lgamerica.com	ext. 4601
Belinda Foggie, Supervisor (11:30 a.m. – 8 p.m.)	bfoggie@lgamerica.com	ext. 4617
Tim Strickland, Supervisor (2:30 p.m. – 11 p.m.)	tstrickland@lgamerica.com	ext. 4628

### CHECK PROCESSING

Process all checks received at the home office. Administer Check 21 process and incoming 1035 processing.

General Service	banner-checks@lgamerica.com	
Kris Wong, AVP	kwong@lgamerica.com	ext. 4935
Kristen Forsythe, Manager	kforsythe@lgamerica.com	ext. 4533

### CLAIMS

Handles notifications and inquiries for and processes health, death, accelerated death and waiver claims. Monitor investigations or contestable claims.

Banner General Service	banner-claims@lgamerica.com	ext. 6974
William Penn General Service		ext. 3379
Jana Knowles, Supervisor	jknowles@lgamerica.com	ext. 4878

### COMMISSIONS

Review and distribute commissions. Review and distribute 1099 forms. Process lost or destroyed check reporting.

General Service	commission@lgamerica.com	ext. 2711
Kris Wong, AVP	kwong@lgamerica.com	ext. 4935
Skip Miller, Senior Manager	smiller@lgamerica.com	ext. 4893
Shannon Stevens, Manager	sstevens@lgamerica.com	ext. 4788

### CUSTOMER SERVICE

Kris Wong, AVP	kwong@lgamerica.com	ext. 4935
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#### Customer Care

Contact Center to handle inquiries from policy holders, general agents and agents regarding in-force policies.

Banner General Service	customerservice@bannerlife.com	
William Penn General Service	customerservice@wpenn.com	
Michele Petruzzello, Senior Manager	mpetruzzello@lgamerica.com	ext. 4815

#### Customer Support

Respond to written inquiries on in-force policies. Process address and title changes; loans; surrenders; 1035 transfers; and bank charges. Record premium payments.

Banner General Service	customerservice@bannerlife.com	
William Penn General Service	customerservice@wpenn.com	
Ann Larochelle, Manager	alarochelle@lgamerica.com	ext. 4646

# We're Here When You Need Us

## Legal & General America – Company Key Contacts

3275 Bennett Creek Ave  
Frederick, MD 21704  
Telephone 888-585-9198  
Fax 301-294-6960

### Customer Solutions

Process in-force illustration requests, complex case handling, conversions, and complaints.

General Service	illustration@bannerlife.com	
Banner Conversions	conversions@bannerlife.com	
William Penn Conversions	conversions@wpenn.com	
Angela Petersen, Manager	apeterse@lgamerica.com	ext. 3103

### DOCUMENT IMAGING

Process incoming mail. Create electronic document images. Maintain document archives.

Johnny Maddox, Supervisor	jmaddox@lgamerica.com	ext. 4662
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### DOCUMENT INDEXING

Submit formal applications. Index all new business and delivery requirements. Notify carriers of replacement.

Banner General Service	banner-submit@lgamerica.com	
William Penn General Service	penn-submit@lgamerica.com	
Kris Wong, AVP	kwong@lgamerica.com	ext. 4935
Kristen Forsythe, Manager	kforsythe@lgamerica.com	ext. 4533

### LEGAL

Review advertising and sales material. Review agency websites. Review agent background material for appointment.

Banner Compliance	mdcompliance@lgamerica.com	
William Penn Compliance	nycompliance@lgamerica.com	

### LICENSING

Contract and appoint new agents. Renew state appointments. Manage agent database including address, commission rates, assignments and payment frequency.

Banner General Service	agentlicensing@bannerlife.com	ext. 4163
William Penn General Service	wpagentlicensing@lgamerica.com	ext. 3374
Kris Wong, AVP	kwong@lgamerica.com	ext. 4935
Skip Miller, Senior Manager	smiller@lgamerica.com	ext. 4893
Claudia Gray, Manager	cgray@lgamerica.com	ext. 4624

### NEW BUSINESS

Banner General Service		ext. 6947
William Penn General Service		ext. 3102

### New Business Supervisors

Barbara Blank, Supervisor Team B	bblank@lgamerica.com	ext. 4441
Elizabeth Fonseca, Supervisor Teams C, F, 1-4	efonseca@lgamerica.com	ext. 3142
Chrissy Harsh, Supervisor Teams D, E, G	charsh@lgamerica.com	ext. 4442
Amanda Villanueva, Supervisor AppAssist	avillanueva@lgamerica.com	ext. 4448
Khelli Williams, Supervisor AppAssist	kwilliams@lgamerica.com	ext. 4618

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### New Business Teams

AppAssist	AIS@bannerlife.com	800-839-5960, option 2
Banner Team B	md-uwteam-B@lgamerica.com	ext. 6947
Banner Team C	md-uwteam-C@lgamerica.com	ext. 6947
Banner Team D	md-uwteam-D@lgamerica.com	ext. 6947
Banner Team E	md-uwteam-E@lgamerica.com	ext. 6947
Banner Team F	md-uwteam-F@lgamerica.com	ext. 6947
Banner Team G	md-uwteam-G@lgamerica.com	ext. 6947
William Penn Team 1	ny-uwteam-1@lgamerica.com	ext. 3102
William Penn Team 2	ny-uwteam-2@lgamerica.com	ext. 3102
William Penn Team 3	ny-uwteam-3@lgamerica.com	ext. 3102
William Penn Team 4	ny-uwteam-4@lgamerica.com	ext. 3102

### UNDERWRITING

Sharon Jenkins, SVP & Chief Underwriter	sjenkins@lgamerica.com	ext. 6953
Liz McSherry, VP Underwriting Operations	emcsherry@lgamerica.com	ext. 4680

### Quick Quotes

[www.lgaquickquote.com](http://www.lgaquickquote.com)

### AppAssist Underwriting Team

Joel Odvody, Manager	jodvody@lgamerica.com	ext. 4742
Becky Steiner, Manager	bsteiner@lgamerica.com	ext. 4714
Jeffrey Banyay, Underwriting Consultant	jbanyay@lgamerica.com	ext. 4736
Indrani Grott, Underwriting Consultant	igrott@lgamerica.com	ext. 4731
Terry Horcher, Sr. Underwriting Consultant	thorcher@lgamerica.com	ext. 4377
Tina Long-Huguley, Underwriting Consultant	thuguley@lgamerica.com	ext. 4779
Nicole James, Sr. Underwriter	njames@lgamerica.com	ext. 4629
Cindy McAulay, Sr. Life Underwriter	cmcaulay@lgamerica.com	ext. 3151
Yvette McReynolds, Underwriting Consultant	ymcreynolds@lgamerica.com	ext. 4378
Elisa Mullen, Sr. Underwriter	emullen@lgamerica.com	ext. 4846
Matt Overman, Senior Underwriter	moverman@lgamerica.com	ext. 4206
Joe Paixao, Life Underwriter	jpaixao@lgamerica.com	ext. 4510
Julie Peterson, Underwriting Consultant	jpeterson@lgamerica.com	ext. 4805
Michael Pfahler, Underwriting Consultant	mpfahler@lgamerica.com	ext. 4606
Mark Skidmore, Underwriting Consultant	mskidmore@lgamerica.com	ext. 4754
Marc Silverstein, Life Underwriter	Msilverstein@lgamerica.com	ext. 4576
LySaundra Solomon, Life Underwriter	lsolomon@lgamerica.com	ext. 4808
James Teegardin, Sr. Underwriting Consultant	jteegardin@lgamerica.com	ext. 4733
Kirin Whitehead, Sr. Underwriter Consultant	kwhitehead@lgamerica.com	ext. 4826
Alden Wilkins, Underwriting Consultant	awilkins@lgamerica.com	ext. 4367

### Banner Underwriting Team B

#### William Penn Underwriting Team 1

Jon Kuhar, Manager	jkuhar@lgamerica.com	ext. 4743
Kim Grose, Manager	kgrose@lgamerica.com	ext. 4466
Mark Boudreaux, Sr. Underwriting Consultant	mboudreaux@lgamerica.com	ext. 3116
Janice Brooks, Sr. Underwriting Consultant	jbrooks@lgamerica.com	ext. 4734
Millicent Daniels-Chamble, Underwriting Consultant	mchamble@lgamerica.com	ext. 4758
Robin Conner, Sr. Underwriter	rconner@lgamerica.com	ext. 4516

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Meshun Eady, Life Underwriter	meady@lgamerica.com	ext. 4472
Debra Drayton, Life Underwriter	ddrayton@lgamerica.com	ext. 4699
Sandy Ebbs, Underwriting Consultant	sebbs@lgamerica.com	ext. 4772
Debra Gobetz, Underwriting Consultant	dgobetz@lgamerica.com	ext. 3088
Lori Grismore, Underwriting Consultant	lgrismore@lgamerica.com	ext. 4374
Alison Koch, Sr. Life Underwriter	akoch@lgamerica.com	ext. 3094
Coleen Kronitz, Sr. Underwriter	ckronitz@lgamerica.com	ext. 4719
Patrick Lahti, Sr. Underwriting Specialist	plahti@lgamerica.com	ext. 4763
Martin Marleau, Life Underwriter	mmarleau@lgamerica.com	ext. 4687
Lori Michaels, Underwriting Consultant	lmichaels@lgamerica.com	
Terri Molaski, Sr. Underwriter	tmolaski@lgamerica.com	ext. 4376
Kathryn Roark, Underwriting Consultant	karoark@lgamerica.com	ext. 4605
Adam Royals, Underwriting Consultant	aroyals@lgamerica.com	ext. 4705
Jeannie Schneider, Underwriting Consultant	jschneider@lgamerica.com	ext. 3146
Jill Shreve, Underwriting Consultant	jshreve@lgamerica.com	ext. 4739
Julie Smith, Underwriting Consultant	jsmith@lgamerica.com	ext. 4844
Amanda Strazishar, Sr. Underwriter	astrazishar@lgamerica.com	ext. 4708

### **Banner Underwriting Team C**

#### **William Penn Underwriting Team 2**

Kimberly Jones, Manager	kijones@lgamerica.com	ext. 4747
Karen Brauck, Sr. Underwriting Consultant	kbrauck@lgamerica.com	ext. 4371
Rebecca Cartland, Sr. Underwriting Consultant	rcartland@lgamerica.com	ext. 4766
Jennifer Greenly, Underwriting Consultant	jgreenly@lgamerica.com	ext. 6940
Jennifer McIntosh, Underwriting Consultant	jmclintosh@lgamerica.com	ext. 4738
Brian O'Flaherty, Sr. Underwriting Specialist	boflaherty@lgamerica.com	ext. 4368
Albert Sanders, Sr. Underwriting Consultant	asanders@lgamerica.com	ext. 4366
Liliana Signori, Underwriting Consultant	lsignori@lgamerica.com	ext. 4751
Tim Van Eck, Sr. Underwriting Consultant	tvaneck@lgamerica.com	ext. 4778

### **Banner Underwriting Team D**

#### **William Penn Underwriting Team 2**

Kimberly Jones, Manager	kijones@lgamerica.com	ext. 4747
Lori McQuiston, Sr. Underwriting Consultant	lmquiston@lgamerica.com	ext. 4753
Cathy Tracy, Underwriting Consultant	ctracy@lgamerica.com	ext. 4928
Shannon Kratzke, Sr. Life Underwriter	skratzke@lgamerica.com	ext. 4625

### **Banner Underwriting Team E**

#### **William Penn Underwriting Team 3**

Nick Amato, Manager	namato@lgamerica.com	ext. 4760
Belinda Davis, Underwriting Consultant	bedavis@lgamerica.com	ext. 6942
Beth Gillespie, Sr. Underwriter	bgillespie@lgamerica.com	ext. 4506
Terri Lyons, Underwriting Consultant	telyons@lgamerica.com	ext. 4776

Gina Marcellino, Sr. Life Underwriter	gmarcellino@lgamerica.com	ext. 3178
Debbie Plati, Life Underwriter	dplati@lgamerica.com	ext. 4725
Joni Stout, Sr. Underwriting Consultant	jstout@lgamerica.com	ext. 4813
Phil Swann, Sr. Underwriter	pswann@lgamerica.com	ext. 4765

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### **Banner Underwriting Team F**

#### **William Penn Underwriting Team 3**

Nick Amato, Manager	namato@lgamerica.com	ext. 4760
Elizabeth Carroll, Sr. Life Underwriter	ecarroll@lgamerica.com	ext. 4711
Alan Sawa, Sr. Underwriting Consultant	asawa@lgamerica.com	ext. 4706
Diane Stevens, Sr. Underwriting Consultant	dstevens@lgamerica.com	ext. 4726
Dale Wolter, Sr. Underwriting Specialist	dwolter@lgamerica.com	ext. 4722

### **Banner Underwriting Team G**

#### **William Penn Underwriting Team 4**

LaLena White, Manager	lwhite@lgamerica.com	ext. 4748
Beth Devine, Sr. Underwriting Consultant	bdevine@lgamerica.com	ext. 4715
Mary Alice Elslager, Underwriting Consultant	melslager@lgamerica.com	ext. 4375
Reva Hull, Sr. Underwriting Consultant	rhull@lgamerica.com	ext. 4767
Brian Kellett, Underwriting Consultant	bkellett@lgamerica.com	ext. 4507
Jim Otis, Underwriting Consultant	jotis@lgamerica.com	ext. 4741
Julie Sartorius, Sr. Underwriting Specialist	jsartorius@lgamerica.com	ext. 4744
Catherine Sheehan, Life Underwriter	csheehan@lgamerica.com	ext. 4698
Kristin Thompson, Underwriting Consultant	kthompson@lgamerica.com	ext. 4373
Heather Wright, Underwriting Consultant	hwright@lgamerica.com	ext. 4730

### **POLICY DELIVERY**

Activate new policies. Process NTO (Not Taken Offers).

Banner General Service	banner-delivery@lgamerica.com	
William Penn General Service	penn_delivery@lgamerica.com	
Melanie White, Supervisor	mwhite@lgamerica.com	ext. 4669

### **POLICY ISSUE**

Issue new policies. Reissue policies.

Banner General Service	banner_reissue@lgamerica.com	
William Penn General Service	Penn_reissue@lgamerica.com	
Melanie White, Supervisor	mwhite@lgamerica.com	ext. 4669

### **SALES**

General Service	marketing@lgamerica.com	ext. 4129
Maryam Boyer, Executive Assistant	mboyer@lgamerica.com	ext. 4555

### **BGA Distribution**

Direction and management of brokerage sales. Agency sales support. Business development. Manage agency corporate relations.

Andrew Doerman, Key Account Manager	adoerman@lgamerica.com	301-461-1680
Ernie Staton, Key Account Manager	estaton@lgamerica.com	240-815-0198
Andrew Hamill, VP Sales Team	ahamill@lgamerica.com	ext. 4511
Mary Beth Bonacorsa, Account Manager	mbonacorsa@lgamerica.com	516-652-9303
Sherri Finke, Account Manager	sfinke@lgamerica.com	240-618-5738

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3275 Bennett Creek Ave  
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Jim Grauel, Account Manager	jgrauel@lgamerica.com	240-397-3775
Peggy Stepanek, Key Account Manager	PStepanek@lgamerica.com	240-907-6105
AJ Basu, Sales Strategy & Planning Director	abasu@lgamerica.com	ext. 4786
Amy Carpenter, Internal Wholesaler	acarpenter@lgamerica.com	ext. 4795
Martie McLaughlin, Internal Wholesaler	mmclaughlin@lgamerica.com	ext. 4554
Zack Nagel, Internal Wholesaler	znagel@lgamerica.com	ext. 4142
Kristin Weldon, Internal Wholesaler	kweldon@lgamerica.com	ext. 4553

## Partnerships

Review direction and management of partnership ventures. Business development and account management of non-traditional channels and collaborations.

Steve Robinson, VP Partnerships	srobinson@lgamerica.com	804-357-2017
Michael Ballou, Internal Account Manager	mballou@lgamerica.com	301-810-4558
Charlie Towson, External Account Manager	ctowson@lgamerica.com	301-810-4818