



NEWS Photo by Brian Swartz

Guiding the experienced staff of Barresi Financial Inc. and Barresi Benefits Group are President Marcus J. Barresi (left), Director of Finance Nathan J. Berry, and Director of Operations Scott D. Boucher. Headquartered in Presque Isle, Barresi Financial also has offices in Bangor and Scarborough.

## Barresi Benefits Group Helps Businessowners Provide Vital Benefits to Their Employees

■ BY BRIAN SWARTZ, SPECIAL SECTIONS EDITOR

**A**s Mainer learn more about Barresi Financial Inc., they like what they see — including the employer-based services available through Barresi Benefits Group, inaugurated this spring.

Established by Marcus J. Barresi in 1979, Barresi Financial provides to Maine residents such financial services and securities products as:

- Life insurance, disability insurance, health insurance, dental insurance, and insurance consulting;
- Estate planning;
- Retirement plan counseling and various retirement plan options, including 401(k) plans, IRA/SEP plans, and 403(b)/TSA plans;
- Individualized financial services;
- College savings plans;
- Profit sharing plans;
- Long-term care coverage.

Headquartered in Presque Isle, Barresi Financial has gradually expanded statewide, opening offices in Bangor and Scarborough. The company “has been successful due to our constant goal to provide our clients with the highest level of service and products,” Marcus Barresi indicated.

Earlier this year, Barresi Financial developed “a new focus on marketing [the] benefits that Maine employers can offer their employees,” said Scott D. Boucher, a Barresi Financial partner and director of operations. “We’ve offered these products in the past; now, with Barresi Benefits Group, we are focusing on helping our customers provide the benefits to find and retain qualified employees.” Among such benefits are health insurance, dental insurance, short- and long-term disability coverage, retirement plan counseling, employee financial services, and employee benefit statements.

“Our financial services division deals with securities,” Marcus Barresi said. Federal compliance

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regulations prompted Barresi Financial to separate its securities sales and marketing from those related to “the health insurance and ancillary benefits part of the company,” he said.

“That’s another reason why we created the benefits group,” Barresi said.

Tapped to head Barresi Benefits Group were Boucher and Nathan J. Berry, another Barresi Financial partner and director of finance. Marcus Barresi has full confidence in Boucher and Berry; “the benefits group is run by a competent staff with the owners involved in the day-to-day, hands-on service,” he said.

“That’s a huge difference between us and our competition, because the owners are actually working with the clients and providing assistance to other business owners,” Barresi said.

According to Boucher, each employer seeks to provide the

maximum and affordable benefits for its employees, but “no set” benefits package “applies in all circumstances.” Instead, Barresi Benefits Group helps each client design a specific benefits package and then, unlike many financial services firms, actually administers that package for the client’s employees.

Barresi Benefits Group offers large employers the ability to develop self-funded health insurance plans. “They have the flexibility to customize plan-design and –funding requirements,” with a third-party administrator handling claims, said Marcus Barresi.

Barresi Financial belongs to the Benefit Advisors Network, a national network encompassing employee benefits brokers who “share information among our peers” to “enhance the services we provide our clients,” Boucher said. Via the Benefits Advisors Network, Barresi Financial can access various resources, including specific technologies, that “would normally not be available to a company our size,” he said.

For example, Barresi Financial now offers its business clients a benefits Web site, “an online resource for employers that they can provide their staff,” Boucher said.

While Boucher and Berry guide Barresi Benefits Group, Marcus Barresi focuses on retirement planning and individual financial services. “Retirement plans are now more employee-driven,” he said. “Employees are selecting the investments. This requires us to pay close attention to each individual’s particular needs. We work very closely with our clients.”

Joining Barresi in working with those clients is Scott Violette, an Aroostook County native who “will add more depth to our retirement planning and our overall financial services department,” Barresi said.

After working seven years for a major national retailer, Violette “wants to come back to his hometown and raise his family here and be involved in a business that helps people,” Barresi said.



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