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# Your Primary Contact

## Executive Benefits & Funding Solutions



**Brooks Berardi**  
Executive Benefits Specialist

### **Attract and Retain the Leadership You Need to Succeed with Executive Benefits**

More than 1,200 credit unions rely on CUNA Mutual Group's Executive Benefits Program to support their leadership continuity goals.\*

As an executive benefits specialist, I'll work closely with you to choose an approach that supports your credit union's interests, including the use of previously non-permissible funding solutions that expand the investment options and return characteristics from the credit union industry's average rate of return on assets. Through multiple, non-proprietary funding options from industry-leading firms, your program can be customized based on your credit union's risk tolerance and investment preferences.

As the trusted credit union provider, you can be confident CUNA Mutual Group will be there to support your due diligence efforts, through our fully-licensed team, throughout the life of your program.

Brooks is an executive benefits specialist for CUNA Mutual Group, a company that specializes in the design, implementation, financing and ongoing administrative support of supplemental executive benefit programs specifically tailored to credit unions. Brooks works with credit unions in the West Region and brings over 11 years experience in the financial services industry.

Prior to joining CUNA Mutual Group, Brooks was a Senior Internal Wholesaler with MetLife Investors. He also was a Registered Investment Advisor and Life Insurance Agent within a high net worth boutique investment advisory firm in Portland, Oregon.

Brooks holds a Bachelor of Science in Business Administration and a minor in Economics from the University of Oregon. He is FINRA securities registered and holds life, health and variable annuity licenses.

You may contact Brooks at [800.356.2644 ext. 665.6716](tel:800.356.2644), or you can email [brooks.berardi@cunamutual.com](mailto:brooks.berardi@cunamutual.com).

\*CUNA Mutual Group internal data, 12/31/17.

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