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# Your Primary Contact

## Executive Benefits & Funding Solutions



**Jay Petty**  
**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 a non-commissioned specialist, I'll work closely with you to choose an approach that supports your credit union's best interests, including the use of previously non-permissible funding solutions that potentially offer higher yields than 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.

Jay is an executive benefits specialist for CUNA Mutual Group, specializing in the design, implementation, financing and ongoing administrative support of supplemental executive benefit programs specifically tailored to credit unions.

Jay has worked in the financial services industry since 1987 and has held several positions within credit union organizations. He served as president & CEO of Pentagon Federal Financial Services, a wholly owned financial services subsidiary of Pentagon Federal Credit Union. He also worked in CUSO Management and internal audit capacities with San Diego County Credit Union and Point Loma Credit Union. Jay joined CUNA Mutual Group in 2002 as a business development consultant for the Members Financial Services Program. His experience with a major national corporate credit union focuses on balance sheet management and institutional investments. He is based in Carlsbad, Calif.

Jay earned a BBA with an accounting focus from Iowa State University. He is FINRA securities registered and holds Life, Health and Variable Life insurance licenses.

You may contact Jay at **800.356.2644 ext. 665.3289**, or you can email [jay.petty@cunamutual.com](mailto:jay.petty@cunamutual.com).

\*CUNA Mutual Group internal data, 12/31/16.

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