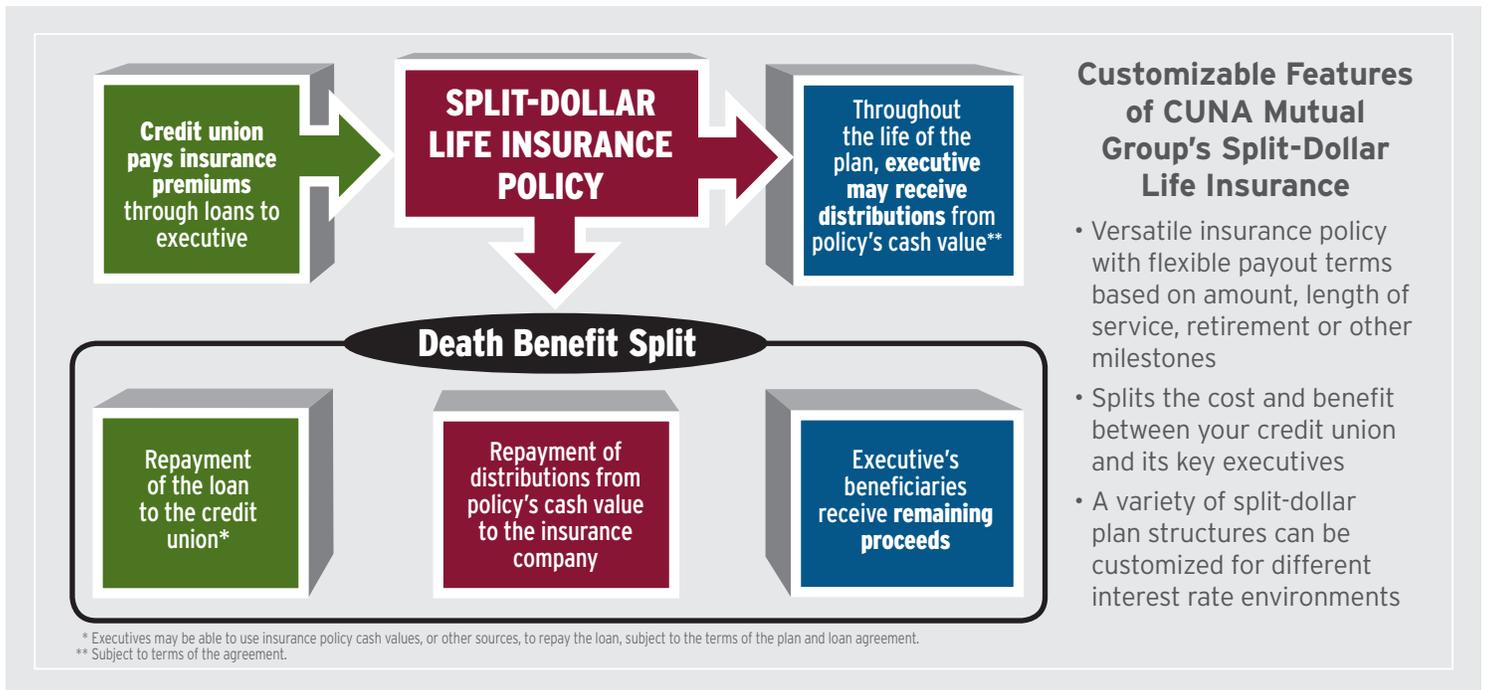


Executive Benefits

# Customizing Split-Dollar Life Insurance strengthens your succession strategy.



A **Split-Dollar Life Insurance** plan is a cost-effective way to enhance your executive compensation package. Because when it comes to top talent, competitive benefits for your C-Suite are a key component to maintaining current leadership.



# Support your succession plan with Split-Dollar Life Insurance from CUNA Mutual Group.

## Experienced provider, licensed support.

Our sales team brings an **average of more than 20 years of financial services industry experience** to help ease the process of establishing a plan. And, we're vigilant about providing updates related to the fiduciary and compliance components of your plan, reviewing it with you on a regular basis.

Our in-house, fully licensed service team is always available to answer questions. You have access to resources such as financial tools to demonstrate the impact of Split-Dollar Life Insurance, and benchmarking data to help stay on top of market trends.



## Customized and unbiased plan design.

Our Split-Dollar Life Insurance is not an "off-the-shelf" program. We tailor it to provide a solution that's best for your succession plan and your entire executive team. Our **experienced specialists** work with a variety of leading vendors to provide a plan design and funding options that support your credit union's leadership continuity and strategic goals.



## Thorough due diligence and expert compliance advice.

Our team of **regulatory and compliance experts** will provide a yearly plan review to make sure it is in line with all **National Credit Union Administration (NCUA)** and other regulatory organizations' rule changes. We meet proactively with the NCUA to discuss current and emerging practices surrounding executive benefits, and are often called upon by other regulating bodies to offer insights as well.



## Deeply rooted in the industry for more than 80 years.

Since we are established in and committed to credit unions, with nearly **3,800 executive benefits plans at 1,200+ credit unions**,<sup>2</sup> you can rest assured knowing that we're committed to supporting you throughout the entire life of the plan.

To learn more about Split-Dollar Life Insurance and other Executive Benefits, visit [cunamutual.com/executivebenefits](http://cunamutual.com/executivebenefits) or call the Executive Benefits Service Center at **800.356.2644, ext. 665.8576** today.

### Other Executive Benefits available from CUNA Mutual Group:

- 457(f) Plan
- Executive Bonus Plan
- Key Person Insurance

Be sure to ask about our potentially higher-yielding funding vehicles: **Total Benefits Pre-Funding** and the **Charitable Donation Account (CDA)**.



**CUNA MUTUAL GROUP**

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<sup>1</sup> CUNA Complete Credit Union Staff Salary Survey, 2017-2018 <sup>2</sup> CUNA Mutual Group, Internal Data, 12/31/17

Proprietary insurance is underwritten by CMFG Life Insurance Company. Proprietary and brokered insurance is sold by CUNA Mutual Insurance Agency, Inc., a wholly owned subsidiary. This insurance is not a deposit and is not federally insured or guaranteed by your credit union. For more information, contact your Executive Benefits Specialist at 800.356.2644. Representatives are registered through, and securities are sold through, CUNA Brokerage Services, Inc. (CBSI), member, FINRA/SIPC, 2000 Heritage Way, Waverly, Iowa 50677, toll-free 866.512.6109. Insurance and annuity products are sold through CMFG Life Insurance Company. Non-deposit investment products are not federally insured, involve investment risk, may lose value and are not obligations of or guaranteed by the credit union.