Your Primary Contact

Executive Benefits & Funding Solutions

John Moreno
Sr. 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.

John 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. John brings to CUNA Mutual his experience in the financial services industry since 1998.

In serving the need for credit unions to retain and attract key executive talent, John brings his broad knowledge of credit unions, their regulatory, accounting and investment environment, and current developments in executive compensation to help credit unions make the most of their benefit dollar.

In his previous role, John was the director of institutional managed account programs for MEMBERS Capital Advisors (MCA) in Madison, Wis. In that role, John was responsible for client acquisition, service of existing accounts, and ensuring a consistent approach to providing institutional investment services to our clients.

Since joining CUNA Mutual Group in 2000, John has directly served member needs as a financial services Representative and institutional clients as director of client services and marketing for MCA. He was named to his present position in 2009.

He began his investment career with Paulson Investment Company in Tucson, Ariz. He has also held positions with Morgan Stanley and Fifth Third Securities Corporation.

John attended the United States Air Force Academy and studied finance at the University of Arizona. He is a sought-after speaker at credit union-focused events and has contributed to the trade press numerous times on the topics of investment management, benefit trends, and the global economy.

You may contact John at 800.356.2644 ext. 665.6921 or you can email john.moreno@cunamutual.com.

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

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