

MassMutual Trust, O.M. Financial Announce New Initiative

Offering Credit Unions Earnings Enrichment Program

The MassMutual Trust Company, FSB and O.M. Financial Group, LLC have launched a program designed to help credit unions address rising employee benefit costs, while increasing their investment earning potential. The **O.M. Financial Earnings Enrichment Program** provides credit unions with a means to pre-fund a wide range of employee benefits with investments that may generate higher returns than traditional credit union investments.

A Far-reaching Solution

“Credit unions are searching for ways to meet the challenges created by escalating employee benefit costs and subpar investment growth,” said Joe Tripalin, O.M. Financial’s national marketing director. “The Earnings Enrichment program can increase a credit union’s earning potential. The credit union can then use the returns generated by the program to offset its employee benefit costs, which can improve its bottom line.”

A Great Match

O.M. Financial customizes and implements the program for credit unions, while MassMutual Trust provides investment management and administrative services.

“This initiative provides credit unions with the perfect blend of experience and expertise on a variety of levels,” said Joe Rokowski, MassMutual Trust president. “O.M. Financial is a leading provider of funding solutions for credit union retirement and employee benefit programs. Meanwhile, MassMutual Trust has a proud history of investment management expertise. We also share a common commitment with O.M. to provide superior service to our clients.”

MassMutual Trust provides investment services to clients across the country with total client assets approaching \$1 billion. O.M. Financial is an independent financial services company that has designed benefit-related programs for over 200 credit unions nationwide.

MassMutual
Trust Company, FSB

The MassMutual Trust Company is a wholly-owned subsidiary of the Massachusetts Mutual Life Insurance Company (MassMutual). The MassMutual Trust Company, FSB is a federal savings bank chartered with the Office of the Comptroller of the Currency to provide discretionary and nondiscretionary trust and fiduciary services in all states. The MassMutual Trust Company does not engage in banking activities (deposits, loans, mortgages etc.) and does not sell products. Business activities are focused on providing trust, fiduciary and investment management services to clients and institutions.

“The Earnings Enrichment Program can increase a credit union’s earning potential.”

Joe Tripalin
National Marketing Director
O.M. Financial Group

“This initiative provides credit unions with the perfect blend of experience and expertise.”

Joe Rokowski
President
MassMutual Trust Company

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O.M. Financial Group