



The Secret to Your Retirement Success

The Industry's Premier Executive Benefit Plan

“When you're putting together an executive retirement program at your credit union, you want to be sure you're working with a company you can count on,” says Fred Healey, retired CEO of Workers' Credit Union. “With O.M. Financial, you can be sure. O.M. demonstrates the highest level of integrity and provides all the program support they promise. Their dedication and expertise has helped me enjoy a wonderful retirement.”

A Trusted Partner

With O.M. Financial at your side, you benefit from years of financial services experience and expertise. We're prepared to help your organization grow stronger and more profitable by designing an executive retirement plan that can cost-effectively enhance your benefit package. Our program:

- Generates substantial retirement income for executives
- Complies with IRS regulations
- Attracts and retains top executive talent

Contact us today for a **free consultation**. Ask for a **free comparison** of our plan to any options you're considering so you can be sure you choose the best program for your credit union.



Fred Healey
Retired CEO,
Workers' Credit Union





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“For us, flexibility was important when we asked O.M. Financial to design a retirement program,” says Andy Hawkinson, CEO at DuTrac Community Credit Union. “They came through, tailoring a plan that not only created long-term peace of mind, but also allowed access to funds in the shorter-term for expenses like college tuition.”

A Personal Approach

Every credit union is different and requires customized retirement funding solutions. That's why we promise to work closely with you to develop a program that matches the unique needs and objectives of your credit union and executives. When we're done, everyone will agree it's the best solution for your goals. Our program:

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Andy Hawkinson
CEO,
DuTrac Community
Credit Union





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“We knew we made an excellent decision when we chose O.M. Financial for our executive retirement plan,” says Ellen Ford, President and CEO of People's Credit Union. “That decision looks even better now after seeing how the program has performed, especially in some difficult economic times. We're extremely satisfied.”

A Proven Solution

Learn what People's Credit Union and hundreds of other credit unions across the country have found out. O.M. Financial can help your executives—and your credit union—reach important long-term financial goals by designing an executive retirement plan that benefits employees and employer alike. Our program:

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Ellen Ford
President and Chief
Executive Officer
People's Credit Union

